

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-234219

Close CW Program When a Person Refused UIB

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Yale Yee
	Reviewed By	Business Analyst, Build/Test teams, CW/CF Committee

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
11/18/2022	1.0	Initial Document	Yale Yee

# Table of Contents

1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	5
1.4	Assumptions .....	5
2	Recommendations.....	6
2.1	Update CW EDBC to close the program for 'Refused UIB' .....	6
2.1.1	Overview .....	6
2.1.2	Description of Changes .....	6
2.1.3	Programs Impacted .....	7
2.1.4	Performance Impacts .....	7
2.2	Update CW UIB Noncooperation Discontinuance NOA .....	7
2.2.1	Overview .....	7
2.2.2	Update CW UIB Noncooperation Discontinuance NOA Verbiage.....	7
2.2.3	Update CW UIB Discontinuance NOA Variable Population .....	8
2.2.4	Update Regulations for CW UIB NonCooperation Disc NOA.....	9
2.2.5	Update CW UIB Noncooperation Discontinuance NOA Generation Conditions.....	9
	Updates to Fragment Generation .....	9
2.3	Update CW UIB Noncooperation Denial NOA .....	10
2.3.1	Overview .....	10
2.3.2	Update CW UIB Noncooperation Denial NOA Verbiage.....	11
2.3.3	Update CW UIB Denial NOA Variable Population .....	12
2.3.4	Update Regulations for CW UIB NonCooperation Denial NOA.....	13
2.3.5	Update CW UIB Noncooperation Denial NOA Generation Conditions...	13
	Updates to Fragment Generation .....	13
2.4	Turn off CW UIB Noncooperation Change NOA .....	15
2.4.1	Overview .....	15
2.4.2	Turn off CW UIB Noncooperation Change NOA.....	15
2.5	Automated Regression Test.....	15
2.5.1	Overview .....	15

## 1 OVERVIEW

---

Counties must deny the CalWORKs (CW) program when a mandatory household member fails to apply for Unemployment Insurance Benefits (UIB) at intake; or discontinue the CW program at the next reporting period when an active household member fails to apply for UIB mid-period.

### 1.1 Current Design

When a mandatory household member fails to apply for UIB and a non-compliance record for failure to apply for Unconditionally Available Income – Apply/Accept UIB is entered, CW EDBC applies the 'Refused UIB' Status Reason to the applicable household member and the remaining household members are given a different status reason i.e. 'No Appl – Req Person'. Because 'Refused UIB' is currently a person level status reason only, the Program Status Reason populates with another closure reason i.e. No Eligible Mem. The CW UIB Non-Cooperation notices are triggered at the individual level when a CW member has the 'Refused UIB' status reason.

Both the CW UIB Non-Cooperation Discontinuance and Denial notices do not have updated state provided verbiage. Additionally, because Refused UIB fails the CW program, the CW UIB Non-Cooperation Change notice will not be triggered by EDBC.

### 1.2 Requests

Update CW EDBC to assign the person level failure reason of 'Refused UIB' to all household members when a mandatory household member fails due to non-compliance for failure to apply for Unconditionally Available Income – Apply/Accept UIB.

Update CW EDBC to add the Program Status Reason of 'Refused UIB' when it is the highest priority failure reason for the CW program.

Update CW EDBC to apply 'Refused UIB' failure reason at Intake, SAR 7 and RE. Do not apply 'Refused UIB' mid-period.

The CW UIB Non-Cooperation notices will be triggered at the program level when the CW program fails with the Program Status Reason of 'Refused UIB'. Update the CW UIB Non-Cooperation Discontinuance and Denial notices with state provided verbiage and remove the CW UIB Non-Cooperation Change NOA.

### 1.3 Overview of Recommendations

1. Updated EDBC to add 'Refused UIB' as a CW program-level closure reason. The status reason of 'Refused UIB' will not be applied mid-period.
2. Update the CW UIB Non-Cooperation Discontinuance NOA to generate at program level and update the fragment to the latest verbiage.
3. Update the CW UIB Non-Cooperation Denial NOA to generate at program level and update the fragment to the latest verbiage.
4. Turn off the CW UIB Non-Cooperation Change NOA.

### 1.4 Assumptions

1. The updates to the UIB non-cooperation denial and discontinuance NOA will not be effective dated, i.e., if the EDBC is run for retro months after this SCR goes to production, the UIB non-cooperation NOA will still have the new verbiage.
2. A non-compliance record of failure to apply for Unconditionally Available Income – Apply/Accept UIB must be entered for EDBC to apply the 'Refused UIB' status reason.
3. When multiple person level status reasons exist on the failing CW program, a hierarchy will determine the status reason used to populate the Program Status Reason.

## 2 RECOMMENDATIONS

### 2.1 Update EDBC to add 'Refused UIB' as a CW program-level closure reason

#### 2.1.1 Overview

When a mandatory CalWORKs (CW) individual refuses UIB, the household and the CW program will be denied or discontinued with the Status Reason of 'Refused UIB'. The Status Reason of Refused UIB is not a mid-period closure reason.

#### 2.1.2 Description of Changes

Update CW EDBC to close (deny/discontinue) the program when a mandatory household member has a Non Compliance for Unconditionally Available Income – Apply/Accept UIB. The program closure reason on the EDBC is 'Refused UIB' and the Status Reason is **NOT** applied mid-period.

CW EDBC will apply 'Refused UIB' when a Non Compliance for Unconditionally Available Income – Apply/Accept UIB record is active during Intake, Redetermination or SAR7 processing.

**Note:** EDBC applies the CW person status reason of 'Refused UIB' to all household members when the program fails for 'Refused UIB'.

**Technical Note:** Set the priority to 1400.

Program Configuration					
System Determination					
EDBC Source: Online EDBC Rules					
Aid Code:					
Program Status: Denied					
Program Status Reason: Refused UIB					
Note: Overridden rows are in bold.					
Name	DOB	Role	Role Reason	Status	Status Reason
<a href="#">Test, Spouse 57F</a>	01/01/1966	MEM		Denied	Refused UIB
<a href="#">Test, Uib 58M</a>	01/01/1965	MEM		Denied	Refused UIB
<a href="#">Test, Child 3M</a>	01/01/2020	MEM		Denied	Refused UIB
<a href="#">Override Program Configuration</a>					

Figure 2.1.1 – Update EDBC to add 'Refused UIB' as a CW program-level closure reason

### 2.1.3 Programs Impacted

CalWORKs

### 2.1.4 Performance Impacts

N/A

## 2.2 Update CW UIB Noncooperation Discontinuance NOA

### 2.2.1 Overview

Currently, the UIB Noncooperation Discontinuance NOA is triggered at the Person level. This change will update the NOA to trigger at the Program level, as well as updating the NOA's verbiage to the latest state-provided text.

The updated fragment verbiage provided by the state has the variable for populating the verification request date (refer to section 2.2.3 for variable population). This notice will not generate if there is no valid verification request date.

**Reason Fragment Name and ID:**

CW\_TN\_UIB\_NOT\_ACC\_A047

ID = 6197

**Current NOA Template:** CW\_NOA\_TEMPLATE (NA 290, Fragment ID: 3026)

**Current Program(s):** CalWORKs

**Current Action Type:** Discontinuance

**Current Fragment Level:** Person

**Currently Repeatable:** Y

**Include NA Back 9:** Y

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

**Existing Languages:** English, Spanish

### 2.2.2 Update CW UIB Noncooperation Discontinuance NOA Verbiage

**Update Fragment XDP**

Update the CW UIB Noncooperation discontinuance NOA verbiage to the following.

**Updated Languages:** English, Spanish

Description	Existing Text	Updated Text
Static	<p>The principal earner in your family has not applied for and/or accepted Unemployment Insurance Benefits, or did all that EDD asked.</p> <p>A principal earner is the parent who has earned the most money in the 24 months before your application for the CalWORKs Unemployed Parent Program. The principal earner named by you or the County is &lt;Person&gt;</p>	<p>We needed certain facts to check your eligibility. On &lt;Verif_Request_Date&gt; we asked you, and/or a member of your household to apply for Unemployment Insurance Benefits (UIB).</p> <p>The rules say you must apply for UIB when the county refers you to the Employment Development Department (EDD), accept benefits when eligible and meet the conditions of eligibility for UIB.</p> <p>The following household member(s)</p> <ul style="list-style-type: none"> <li>• did not apply for and/or accept (UIB) benefits; or</li> <li>• provide proof of application; and/or</li> <li>• did not ask the County for help getting this proof.</li> </ul> <p>&lt;List of persons&gt;</p>
Static	<p>El asalariado principal de su familia no ha solicitado y/o aceptado Beneficios del Seguro Contra Desempleo (UIB) o no cumplió con los requisitos del Departamento de Desarrollo de Empleos (EDD).</p> <p>El asalariado principal es el padre o madre que ganó más dinero en el período de 24 meses anteriores a su solicitud para el programa CalWORKs de Padre Desempleado.</p> <p>El asalariado principal nombrado por usted o el Condado es &lt;Person&gt;</p>	<p>Necesitamos cierta información para verificar su elegibilidad. En &lt;Verif_Request_Date&gt; le pedimos a usted, y/o un miembro de su familia que solicitará(n) beneficios de Seguro por Desempleo (UIB).</p> <p>La regla indica que usted tiene que solicitar UIB cuando el Condado la refiere al Departamento de Desarrollo de Empleo (EDD), aceptar beneficios cuando es elegible y cumplir con las condiciones de elegibilidad para UIB.</p> <p>El/Los siguientes miembros del hogar:</p> <ul style="list-style-type: none"> <li>• no aplicaron y/o aceptaron beneficios de (UIB); o</li> <li>• obtener pruebas de la solicitud; y/o</li> <li>• no pidió ayuda al Condado para obtener éstas pruebas.</li> </ul> <p>&lt;List_of_persons&gt;</p>

Note: Format the English and Spanish fragments with Arial font size 10.

**2.2.3 Update CW UIB Discontinuance NOA Variable Population**

Add the verif\_request\_date and list\_of\_persons variable population listed below.

Variable Name	Population
<Verif_Request_Date>	Scenario 1:

	<p>If the Non-Compliance list page has only one person with the “Apply/Accept UIB” reason/instance, populate the “Apply For Unconditionally Available Income” verification requested date (associated to the person with the non-compliance) if the verification is still in ‘Pending’ or ‘Refused’ status.</p> <p>Scenario 2:</p> <p>If the Non-Compliance list page has multiple persons with the “Apply/Accept UIB” reason/instance, find the latest “Apply For Unconditionally Available Income” verification request date for the persons with the non-compliance if the verification is still in ‘Pending’ or ‘Refused’ status.</p> <p>Example: Non-Compliance exists for Person A and Person B.  “Apply For Unconditionally Available Income” verification was requested for Person A on 05/20/2023 and for person B it was requested on 05/25/2023, the &lt;verif_request_date&gt; should populate 05/25/2023</p> <p>Note: If there a Person C with a pending or refused “Apply For Unconditionally Available Income” verification but there is no “Apply/Accept UIB” Non-Compliance tied this Person, then the verification request date for this person will not be considered.</p> <p>Note for both scenarios:</p> <ol style="list-style-type: none"> <li>1. The UIB discontinuance NOA will not generate if there is no pending or refused verification record for the person(s) with the non-compliance.</li> </ol>
<List of Person(s)>	<p>Populate the person(s) with the Non-Compliance of “Apply/Accept UIB” if this person(s) is a member of CalWORKs program.  (i.e., ROLE_CODE = ‘ME’ in PGM_PERS_DETL table)</p>

Note: Format the English and Spanish fragments with Arial font size 10.

**Variables Requiring Translations:** N/A

#### 2.2.4 Update Regulations for CW UIB NonCooperation Disc NOA

The CW UIB Noncooperation discontinuance NOA has new associated Regulations. The following Regulations will be added when the CW UIB Noncooperation discontinuance Reason is generated on a NOA:

Existing Regulations: EAS: 41-401, 41-440.1 (a), (c), 41-440.2

Updated Regulations: MPP: 40-105.1, 40-181.2; .3, 82-612

#### 2.2.5 Update CW UIB Noncooperation Discontinuance NOA Generation Conditions

##### Updates to Fragment Generation

1. Update the UIB Noncooperation Discontinuance NOA fragment's generation conditions to trigger at the Program level.
2. Generate this NOA only if there is a valid <verif\_request\_date> to populate on the UIB discontinuance reason fragment.

Note: Refer to section 2.2.3 for <verif\_request\_date> variable population and 2.2.2 for fragment verbiage.

Note: The existing trigger conditions for the CW UIB Noncooperation discontinuance NOA will remain the same unless explicitly mentioned in this SCR.

**New NOA Template:** N

**New Program Generation:** N

**New Action Type:** N

**Update to Fragment Level:** Y - Program

**Repeatable:** N

**New Forms/NOAs Generated with this NOA:** N

Generation Type	Does this NOA reason currently generate prior to this effort?	Is this generation type being updated with this effort?
EDBC	Yes	Yes, see above.
Negative Action EDBC	No	No
Batch	No	No

## 2.3 Update CW UIB Noncooperation Denial NOA

### 2.3.1 Overview

Currently, the UIB Noncooperation Denial NOA is triggered at the Person level. This change will update the NOA to trigger at the Program level, as well as updating the NOA's verbiage to the latest state-provided text.

The updated fragment verbiage provided by the state has the variable for populating the verification request date (refer to section 2.2.3 for variable population). This notice will not generate if there is no valid verification request date.

**Reason Fragment Name and ID:**

CW\_DN\_UNEMP\_INS\_BEN\_NOT\_ACCP\_A047

ID = 6130

**Current NOA Template:** CW\_NOA\_TEMPLATE (NOA 290, Fragment ID: 3026)

**Current Program(s):** CalWORKs

**Current Action Type:** Denial  
**Current Fragment Level:** Person  
**Currently Repeatable:** Y  
**Include NA Back 9:** Y  
**Current Forms/NOAs Generated with this NOA:** N/A  
**Existing Languages:** English, Spanish

### 2.3.2 Update CW UIB Noncooperation Denial NOA Verbiage

#### Update Fragment XDP

Update the CW UIB Noncooperation discontinuance NOA verbiage to the following.

**Updated Languages:** English, Spanish

Description	Existing Text	Updated Text
Static	<p>The principal earner in your family has not applied for and/or accepted Unemployment Insurance Benefits, or did all that EDD asked.</p> <p>A principal earner is the parent who has earned the most money in the 24 months before your application for the CalWORKs Unemployed Parent Program.</p> <p>The principal earner named by you or the County is &lt;Person&gt;</p>	<p>You must give us facts and proof we need and do the other things we need you to, as best you can. You did not do as we asked.</p> <p>On &lt;Verif_Request_Date&gt; we asked you, and/or a member of your household to apply for Unemployment Insurance Benefits (UIB).</p> <p>The rules say you must apply for UIB when the county refers you to the Employment Development Department (EDD), accept benefits when eligible and meet the conditions of eligibility for UIB.</p> <p>The following household member(s)</p> <ul style="list-style-type: none"> <li>• did not apply for and/or accept (UIB) benefits; or</li> <li>• provide proof of application; and/or</li> <li>• did not ask the County for help getting this proof.</li> </ul> <p>&lt;List of persons&gt;</p> <p>If you are having problems getting the proof we need, call the County and we can help you try to get it. If you do what we ask and give us the proof and facts we need or ask the County for help before &lt;Due_Date&gt;, we will take another look at your application.</p>
	<p>El asalariado principal de su familia califica para Beneficios del Seguro Contra Desempleo (UIB) pero no los ha solicitado y/o aceptado, o no cumplió con los requisitos del Departamento de Desarrollo de Empleos (EDD).</p>	<p>Usted tiene que darnos los datos y las pruebas que necesitamos, y tiene que hacer las otras cosas que necesitamos que haga lo mejor que pueda. Usted no ha hecho lo que le pedimos.</p>

	<p>El asalariado principal es el padre o madre que ganó más dinero en el período de 24 meses anteriores a su solicitud para el programa CalWORKs de Padre Desempleado.</p> <p>El asalariado principal nombrado por usted o el Condado es &lt;Person&gt;</p>	<p>En &lt;Verif_Request_Date&gt; le pedimos a usted, y/o un miembro de su familia que solicitará(n) beneficios de Seguro por Desempleo (UIB).</p> <p>La regla indica que usted tiene que solicitar UIB cuando el Condado la refiere al Departamento de Desarrollo de Empleo (EDD), aceptar beneficios cuando es elegible y cumplir con las condiciones de elegibilidad para UIB.</p> <p>El/Los siguientes miembros del hogar:</p> <ul style="list-style-type: none"> <li>• no aplicaron y/o aceptaron beneficios de (UIB); o</li> <li>• obtener pruebas de la solicitud; y/o</li> <li>• no pidió ayuda al Condado para obtener éstas pruebas.</li> </ul> <p>&lt;List_of_persons&gt;</p> <p>Si está teniendo problemas para obtener las pruebas que necesitamos, llame al Condado y nosotros le ayudaremos a tratar de obtenerlas. Si hace lo que le pedimos, y nos da todas las pruebas y datos que necesitamos antes de &lt; Due_Date&gt;, revisaremos su solicitud nuevamente.</p>
--	---	--

Note: Format the English and Spanish fragments with Arial font size 10.

### 2.3.3 Update CW UIB Denial NOA Variable Population

Add the `verif_request_date`, `list_of_persons` and `due_date` variable population listed below.

Variable Name	Population
<Verif_Request_Date>	<p>Scenario 1:</p> <p>If the Non-Compliance list page has only one person with the “Apply/Accept UIB” reason/instance, populate the “Apply For Unconditionally Available Income” verification requested date (associated to the person with the non-compliance) if the verification is still in ‘Pending’ or ‘Refused’ status.</p> <p>Scenario 2:</p> <p>If the Non-Compliance list page has multiple persons with the “Apply/Accept UIB” reason/instance, find the latest “Apply For Unconditionally Available Income” verification request date for the persons with the non-compliance if the verification is still in ‘Pending’ status.</p> <p>Example: Non-Compliance exists for Person A and Person B.</p> <p>“Apply For Unconditionally Available Income” verification was requested for Person A on 5/20/2023 and for person B it was requested on 5/25/2023, the &lt;verif_request_date&gt; should populate 5/25/2023</p> <p>Note: If there a Person C with a pending or refused “Apply For Unconditionally Available Income” verification but there is no “Apply/Accept UIB” Non-Compliance tied this Person, then the verification request date for this person will not be considered.</p> <p>Note for both scenarios:</p>

	1. The UIB denial NOA will not generate if there is no pending verification record for the person(s) with the non-compliance.
<List of Person(s)>	Populate the person(s) with the Non-Compliance of "Apply/Accept UIB.
<Due_Date>	Populate this date by adding 30 days to the CalWORKs application date. Example: If the application date (APP_DATE from C4Y_APP table) is May 1 <sup>st</sup> , the due date will be May 31 <sup>st</sup>

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

**Variables Requiring Translations:** N/A

### 2.3.4 Update Regulations for CW UIB NonCooperation Denial NOA

The CW UIB Noncooperation denial NOA has new associated Regulations. The following Regulations will be added when the CW UIB Noncooperation denial reason is generated on a NOA:

Existing Regulations: EAS: 41-401, 41-440.1 (a), (c) 41-440.2

Updated Regulations: MPP: 40-126.341, 40-171.221 (i), 82-612

### 2.3.5 Update CW UIB Noncooperation Denial NOA Generation Conditions

#### Updates to Fragment Generation

1. Update the UIB Noncooperation Denial NOA fragment's generation conditions to trigger at the Program level.
2. Generate this NOA only if there is a valid <verif\_request\_date> to populate on the UIB denial reason fragment.  
Note: Refer to section 2.3.3 for <verif\_request\_date> variable population and 2.3.2 for fragment verbiage.  
Note: The existing trigger conditions for the CW UIB Noncooperation denial NOA will remain the same unless explicitly mentioned in this SCR.

**New NOA Template:** N

**New Program Generation:** N

**New Action Type:** N

**Update to Fragment Level:** Y - Program

**Repeatable:** N

**New Forms/NOAs Generated with this NOA:** N

Generation Type	Does this NOA reason currently generate prior to this effort?	Is this generation type being updated with this effort?
EDBC	Yes	Yes, see above.
Negative Action EDBC	No	No
Batch	No	No

## 2.4 Turn off CW UIB Noncooperation Change NOA

### 2.4.1 Overview

Turn off the CW UIB Change notice, as a refusal to accept UIB by a member of the household will result in discontinuance.

**Reason Fragment Name and ID:**

CW\_CH\_UNEMP\_BFTS\_NOT\_ACC\_A047

ID = 6198

**Current NOA Template:** NA 290

**Current Program(s):** CalWORKs

**Current Action Type:** Change

**Current Fragment Level:** Person

**Currently Repeatable:** Y

**Include NA Back 9:** Y

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

**Existing Languages:** English, Spanish

### 2.4.2 Turn off CW UIB Noncooperation Change NOA

Turn off CW Change NOA for UIB Noncooperation.

ID	Fragment Name	Languages
6198	CW_CH_UNEMP_BFTS_NOT_ACC_A047	English, Spanish

## 2.5 Automated Regression Test

### 2.5.1 Overview

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

### 2.5.2 Description of Changes

Create a CW case. Have one person Refuse UIB. Run EDBC and confirm that the entire program goes from Active to Discontinued and Pending to Denied, and that the correct NOAs generate.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-236888

ACWDL 22-01-Updated MC 239 Disc NOA-Over  
Income and Not Otherwise MC Eligible

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Nithya Chereddy
	Reviewed By	Priya Sridharan, Geetha Ramalingam

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
01/16/2023	1.0	Initial Version	Nithya Chereddy

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Update the MAGI over income discontinuance NOA Reason.....	5
	2.1.1 Overview .....	5
	2.1.2 Form/NOA Verbiage .....	5
3	Supporting Documents .....	8
4	Requirements.....	9
	4.1 Project Requirements.....	9

# 1 OVERVIEW

---

The ACWDL 22-01 provided the updated Notice of Action language for Individuals discontinued from the MAGI Medi-Cal due to over the MAGI limits. The NOA language provided through the ACWDL 22-01 will replace the NOA language provided through the ACWDL 16-14.

## 1.1 Current Design

The MAGI over Income discontinuance NOA currently has the language provided as part of the ACWDL 16-14.

## 1.2 Requests

Update the MAGI over income discontinuance NOA verbiage to the language provided as part of the ACWDL 22-01.

## 1.3 Overview of Recommendations

1. Update the MAGI over income discontinuance NOA to the latest version provided as part of the ACWDL 22-01.

## 1.4 Assumptions

1. The missing threshold languages Arabic, Hmong, and Lao for the MAGI over income discontinuance NOA will be added to the system with the SCR CA-214024.
2. The missing threshold languages Arabic, Hmong, and Lao for the MAGI over income discontinuance NOA will be added to the system with the SCR CA-214024.
3. The MAGI over income discontinuance NOA language that was provided through the ACWDL 22-01 has been adjusted to flow through the existing NOA structure.
4. The MAGI over income discontinuance NOA language that was provided through the ACWDL 22-01 has been adjusted to flow through the existing NOA structure.

## 2 RECOMMENDATIONS

---

### 2.1 Update the MAGI over income discontinuance NOA Reason

#### 2.1.1 Overview

The existing MAGI over income discontinuance NOA is from the ACWDL 16-14.

**Reason Fragment Name and ID:** H\_TN\_OVER\_MAGI\_INCOME\_H113  
(Fragment ID: 7067)

**Known County NOA:** Derived from ACWDL 16-14

**Current NOA Template:** H\_NOA\_TEMPLATE (Fragment ID: 3033)

**Current Program(s):** Medi-Cal

**Current Action Type:** Discontinuance

**Current Fragment Level:** Person

**Currently Repeatable:** Yes

**Includes NA Back 9:** Yes

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

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

#### 2.1.2 Form/NOA Verbiage

Update MAGI over income discontinuance NOA reason to the latest verbiage provided as part of the ACWDL 22-01.

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

**Note:** The remaining threshold fragments will be added as part of the SCR CA-214024.

**Mockups:** The XDPs and PDFs of all languages getting updated as part of this SCR are attached to supporting documents section in JIRA with the name 'Supporting Documents.zip'.

Existing Language	Updated Language
We have looked at all of the information we have about your case. Based on this information, your eligibility for Medi-Cal will end on the last day of {MonthYear1}. The reason your Medi-Cal is stopping is: You no longer qualify for Medi-Cal. This is because your household income is above the allowed amount. We counted your household size and income to make our decision. For Medi-Cal, your household	We have looked at all of the information we have about your case. Based on this information, your eligibility for Medi-Cal will end on the last day of {MonthYear1}.  The reason your Medi-Cal is stopping is:  You no longer qualify for Medi-Cal. This is because your household income is above the allowed amount. We counted your

size is {MagiSize} and your monthly household income is {MagilIncome}. The monthly Medi-Cal income limit based on your age and household size is {MagilIncomeLimit}. Your income is above this limit, so you do not qualify for Medi-Cal.

We used the information you gave us and our records to make our decision. If you have questions or think we made a mistake, or if you have more information to give us, contact the Medi-Cal office at the number listed above immediately. You also have the right to appeal. See below for more information on your appeal rights.

If you are pregnant or disabled and have not reported this information, you may be able to stay on Medi-Cal. If you would like to see if you can stay on Medi-Cal, please tell us by calling the Medi-Cal office at the number listed above to report your pregnancy or disability.

### **TAKE ACTION NOW TO GET NEW HEALTH COVERAGE**

Since your income is now too high for Medi-Cal, you have been referred to Covered California. Through Covered California, individuals and families can get help paying for private health insurance. You may qualify for financial help that can lower monthly costs (called premiums) and copayments. The amount of financial help is based on household size and annual household income. You do not need to fill out a new application.

**Your Medi-Cal is ending and you must act quickly to get covered.** You must pick a Covered California health plan before your Medi-Cal coverage ends and pay your premium by the due date provided in the first bill so that you do not go without health care coverage. You have an additional 60 days from the time your Medi-Cal ends to enroll in a Covered California health plan. **However, if you do not pick a Covered California plan before your Medi-Cal ends you will not have health coverage the following month.**

Call your local county office at the number listed on this notice or Covered California at 800-300-1506 to ask questions about Covered California or to pick a plan. If you would like help picking a Covered California health plan, you can contact a

household size and income to make our decision. For Medi-Cal, your household size is {MagiSize} and your monthly household income is {MagilIncome}. The monthly Medi-Cal income limit based on your age and household size is {MagilIncomeLimit}. Your income is above this limit, so you do not qualify for Medi-Cal.

We used the information you gave us and our records to make our decision. If you have questions or think we made a mistake, or if you have more information to give us, contact the Medi-Cal office at the number listed above immediately. You also have the right to appeal. See below for more information on your appeal rights.

If you are pregnant or disabled and have not reported this information, you may be able to stay on Medi-Cal. If you would like to see if you can stay on Medi-Cal, please tell us by calling the Medi-Cal office at the number listed above to report your pregnancy or disability.

### **Act now!**

Medi-Cal works with Covered California to help you stay covered. You do not need to re-apply. We sent your information to Covered California to find out if you qualify for financial help. Through Covered California, most individuals and families can get help paying for health insurance.

If you qualify, Covered California will soon send you a letter. The letter will tell you if you need to choose a health plan or if one was chosen for you. The letter will also tell you about your options, what actions to take, important due dates, and how to find your application online.

Choose your new health plan before your Medi-Cal ends so you can use your health care right away.

Please Note: Other family members with different Medi-Cal eligibility may receive a separate notice.

<MAGIRegulations> is the regulation or law we relied on for this decision.

<p>Covered California Certified Enrollment Counselor or Certified Insurance Agent; they can help you figure out the best plan for you. To find an enrollment counselor or agent near you, go to <a href="http://www.CoveredCA.com">www.CoveredCA.com</a> and click on "Find Local Help."</p> <p>Please Note: Other family members with different eligibility may receive a separate notice.</p> <p>&lt;MAGIRegulations&gt; is the regulation or law we relied on for this decision.</p>	
---	--

Note:

1. The variable population logic for the updated fragment will remain the same as the existing fragment's.
2. English will be formatted using Arial font size 10, Spanish and threshold will generate based on project standards for that language.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1.	Client Correspondence	Mockups of the updated fragment	Supporting Documents.zip (*The supporting documents are attached to JIRA)

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.9	The LRS shall use standard text for all notices, NOAs, forms, letters, stuffers, and flyers.	The MAGI Over Income Discontinuance NOA reason fragment is updated to incorporate state provided verbiage.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-242372

Update Imaging Report Date fields

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Susanna Martinez
	Reviewed By	Ravneet Bhatia, Thao Ta, Gokul Suresh

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
5/16/23	1.0	Initial Document	Susanna Martinez

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	5
2	Recommendations.....	5
	2.1 Imaging – Document Capture Report .....	5
	2.1.1 Overview .....	5
	2.1.2 Imaging – Document Capture Report Mockup.....	5
	2.1.3 Description of Change.....	9
	2.1.4 Report Location .....	10
	2.1.5 Counties Impacted .....	10
	2.1.6 Security Updates.....	10
	2.1.7 Report Usage/Performance .....	10
3	Supporting Documents .....	10
4	Requirements.....	11
	4.1 Project Requirements.....	11
	4.2 Migration Requirements.....	11
5	Appendix.....	11

# 1 OVERVIEW

---

The Imaging – Document Capture reporting data is based on the latest data transfer CSV file provided by Hyland. This transfer is currently set to be run nightly, thus the current day's reporting data for Imaging reports is as of the previous day.

Since the Hyland CSV file is based on the previous day's data and isn't processed by the report until the following day the 'Run Date' and 'Data as of' fields are causing confusion for workers and make it appear that the report is missing one day's worth of data. The 'Run Date' and 'Date as of' fields will need to be updated to better reflect the data population selected by the user.

## 1.1 Current Design

The 'Run Date' field is the date the report is ran by the user which will be defaulted to the current day's date. The 'Data as of' field is the Run Date that is provided in the Hyland CSV file.

For example, the Hyland CSV file for 6/29, containing the previous day's data from 6/28, is received and processed the night of 6/29. This data then becomes available in the report the next day on 6/30. In this example:

- 'Data as of' date displayed in the report is 6/29 which is the Run Date given in the file.
- 'Run Date' displayed in the report is the current date and would display as 6/30 when the user generates the report to see the latest data.

## 1.2 Requests

Update the 'Run Date' and 'Data as of' fields to better reflect the file processing date versus report generation date versus the date for the data population selected/displayed.

## 1.3 Overview of Recommendations

1. Update the 'Data as of' and 'Run Date' fields in the report to better reflect the file processing date versus report generation date versus the date for the data population selected/displayed.
2. Update the 'Office Number' column in the 'Staff Documents Captured' and 'External Documents Captured' sheets to be left aligned.
3. Rename the 'Begin Month' parameter to 'Document Capture Month'.
4. Rename the 'Begin Date' parameter to 'Document Capture Date'.
5. Rename the 'Begin Date' field on the 'External Documents Captured' sheet to 'Document Capture Date'.

- Update the 'Document Capture Date' field on the 'External Documents Captured' sheet to display the earliest 'Document Capture Date' chosen on the 'Report Filters' sheet.

## 1.4 Assumptions

- The reporting data will be based on the latest data transfer provided by Hyland. This transfer is currently set to be run nightly, thus the current day's reporting data for Imaging reports is as of the previous day. If the Hyland CSV file is received on 6/29 it is expected to have the data for the documents that were captured on 6/28. The file for 6/29 is processed the night of 6/29 and is made available in the report on 6/30.
- No changes to the Imaging – Exception Queues Aging Report or Imaging – Initial QA Report are required.

## 2 RECOMMENDATIONS

### 2.1 Imaging – Document Capture Report

#### 2.1.1 Overview

The Imaging – Document Capture Report displays the number of staff Documents captured by Type, and External Documents captured by location for the date range specified. This is an On Request curated report.

#### 2.1.2 Imaging – Document Capture Report Mockup

The screenshot shows the 'Report Filters' interface in CalSAWS. It features four main filter columns: 'Document Capture Month', 'Document Capture Date', 'Office', and 'County'. Each column has a search icon and a dropdown arrow. The 'Document Capture Date' column is currently displaying a list of dates from 9/28/2021 to 10/15/2021. The 'Office' column shows a list of office codes from BA to LA. The 'County' column shows a list of California counties from Alameda to Mono. At the bottom of the interface is a blue 'Generate Results' button.

Document Capture Month	Document Capture Date	Office	County
Sep-21	9/28/2021		Alameda
Oct-21	9/27/2021	BA	Alpine
Nov-21	9/28/2021	BB	Amador
Dec-21	9/28/2021	BC	Butte
Jan-22	9/28/2021	BD	Calaveras
Feb-22	10/1/2021	BE	Colusa
Mar-22	10/3/2021	BF	Contra Costa
Apr-22	10/4/2021	BG	Del Norte
May-22	10/5/2021	BH	El Dorado
Jun-22	10/6/2021	BI	Fresno
Jul-22	10/7/2021	BJ	Glenn
Aug-22	10/8/2021	BK	Humboldt
Sep-22	10/10/2021	BL	Imperial
Oct-22	10/11/2021	BM	Inyo
Nov-22	10/12/2021	BN	Kern
Dec-22	10/13/2021	BO	Kings
Jan-23	10/14/2021	BP	Lake
Feb-23	10/15/2021	BQ	Lassen
Mar-23	10/17/2021	BR	Los Angeles
Apr-23	10/18/2021	BS	Madera
May-23	10/19/2021	BT	Marin
Jun-23	10/20/2021	BU	Mariposa
Jul-23	10/21/2021	BV	Mendocino
	10/22/2021	BX	Merced
	10/24/2021	BY	Modoc
	10/25/2021	LA	Mono

Figure 2.1.2 – Report Filters Sheet

Qlik ... Analyze Sheet Narrate Storytelling Imaging - Document Capture Report

Insight Advisor =Date!(Month/REPO... x COUNTY\_NAME x  
Jun-23 Los Angeles

CaSAWS Staff Documents Captured

Return to Filters County Los Angeles Run Date 6/30/2023 Data Transferred Date 6/29/2023

Staff Documents Captured

Created By	Staff Name	Office Number	Number of Documents Captured	Number of Pages Captured	Single Case	Multi Case	SIU	Hearin...	RDB	Returned Mail	CWS	AAP	IHSS	QA/QC	Ignore Barcode	Import / Virtual Captured
<b>Totals</b>			<b>1316515</b>	<b>4048823</b>	<b>304968</b>	<b>496268</b>	<b>2749</b>	<b>0</b>	<b>0</b>	<b>44093</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>7378</b>	<b>0</b>
username	Lastname, Firstname	GN	7	17	0	7	0	0	0	0	0	0	0	0	0	0
username	Lastname, Firstname	GU	11789	29448	3022	8730	0	0	0	0	0	0	0	0	37	0
username	Lastname, Firstname	GV	7437	17839	0	7437	0	0	0	0	0	0	0	0	0	0

Figure 2.1.2.1 – Staff Documents Captured Sheet

CaSAWS External Documents Captured

Return to Filters County County Run Date 6/30/2023 Data Transferred Date 6/29/2023

External Documents Captured

Captured Source	Office Number	Number of Documents Captured	Number of Pages Captured
<b>Totals</b>		<b>52158</b>	<b>84619</b>
33 Moreno Valley Ser.Su.McHenry	-	259	894
36 Victorville TAD/WTVW/Chia Case/PRD	-	295	1095
33 Hemet Ser.Su.McHenry	-	231	826
34 SB TAD SA/WTVW/Chia Case/PRD	-	177	722
36 SB TAD 911/WTVW/Chia Case/PRD	-	166	535
38 HSA Main Office	-	145	520

Figure 2.1.2.2 – External Documents Captured Sheet



Figure 2.1.2.3 – Run Date Field Before Description Update

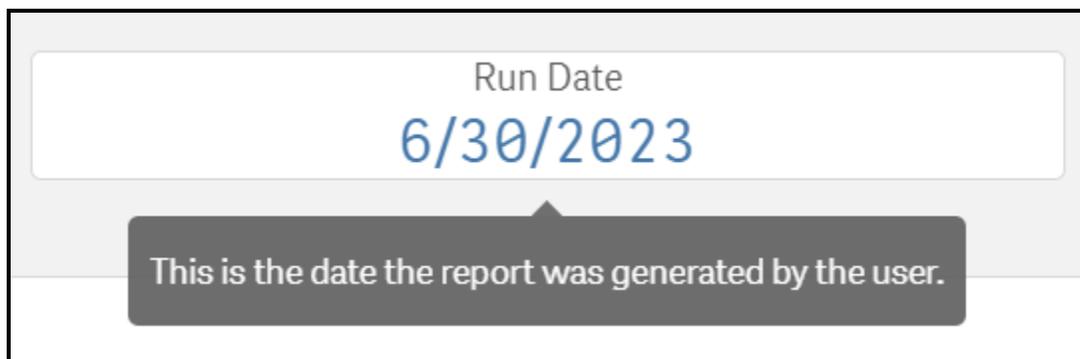
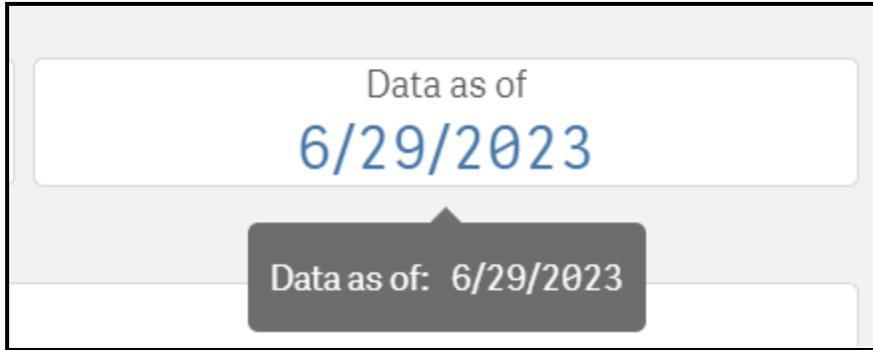
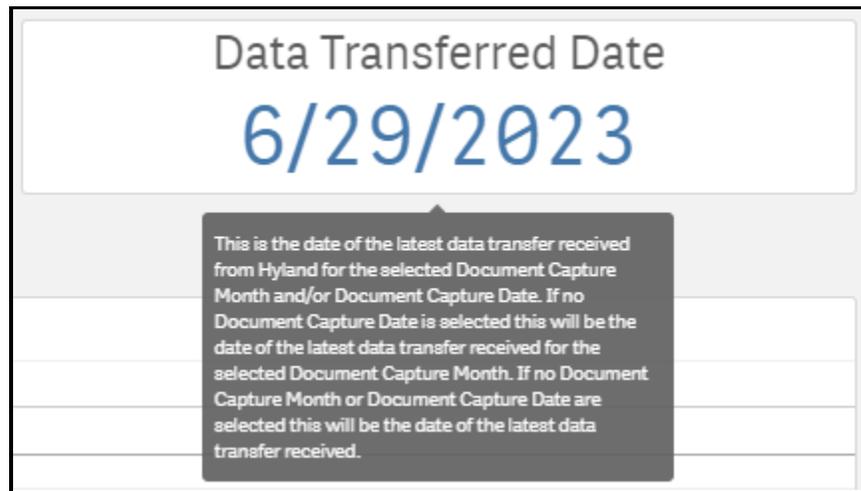


Figure 2.1.2.4 – Run Date Field After Description Update



**Figure 2.1.2.5 – Data as of Field Before Description and Rename Update**



**Figure 2.1.2.6 – Data as of Field After Description and Rename Update**

Office Number	
WC	
WC	
WC	
	05
	51
	80
	04

**Figure 2.1.2.7 – Office Number Column Formatting Before Update**

Office Number
11
03
02
02
03
09
01
01

**Figure 2.1.2.8 – Office Number Column Formatting After Update**

CalSAWS Report Filters

<input type="text" value="Begin Month"/>	<input type="text" value="Begin Date"/>
Sep-21	9/26/2021
Oct-21	9/27/2021

**Figure 2.1.2.9 – Begin Month and Begin Date Parameters Before Rename Update**

CalSAWS Report Filters

<input type="text" value="Document Capture Month"/>	<input type="text" value="Document Capture Date"/>
Jun-22	6/30/2022

**Figure 2.1.2.10 – Begin Month and Begin Date Parameters After Rename Update**

Begin Date  
6/28/2023

**Figure 2.1.2.11 – Begin Date Field Before Rename Update**

Document Capture Date  
6/28/2023

**Figure 2.1.2.12 – Begin Date Field After Rename Update**

### 2.1.3 Description of Change

1. Update the 'Run Date' field on the 'Staff Documents Captured' and 'External Documents Captured' sheets to include a description when the user hovers over the field.
  - a. The 'Run Date' field description will read:

“This is the date the report was generated by the user.”
2. Rename the 'Data as of' field on the 'Staff Documents Captured' and 'External Documents Captured' sheets to 'Data Transferred Date'.
3. Update the 'Data Transferred Date' field on the 'Staff Documents Captured' and 'External Documents Captured' sheets to include a description when the user hovers over the field.
  - a. The 'Data Transferred Date' field description will read:

“This is the date of the latest data transfer received from Hyland for the selected Document Capture Month and/or Document Capture Date. If no Document Capture Date is selected this will be the date of the latest data transfer received for the selected Document Capture Month. If no Document Capture Month or Document Capture Date are selected this will be the date of the latest data transfer received.”
4. Update the 'Office Number' column on the 'Staff Documents Captured' and 'External Documents Captured' sheets to be left aligned.
5. Rename the 'Begin Month' parameter to 'Document Capture Month' on the 'Report Filters' sheet.
6. Rename the 'Begin Date' parameter to 'Document Capture Date' on the 'Report Filters' sheet.
7. Rename the 'Begin Date' field to 'Document Capture Date' on the 'External Documents Captured' sheet.
8. Change the 'Document Capture Date' field on the 'External Documents Captured' sheet to display the minimum 'Document Capture Date' based on the 'Document Capture Date' parameter values selected on the 'Report Filters' sheet.
  - a. For example, if the user selects the 'Document Capture Date' parameter values of '6/26/2023', '6/27/2023' and '6/29/2023' then the 'Document Capture Date' field value will display the '6/26/2023' date.

**Note:** If no 'Document Capture Date' parameter is selected on the 'Report Filters' sheet then the 'Document Capture Date' field will be based on the latest data transfer received from Hyland for the selected 'Document Capture Month'. If no 'Document Capture Month' and no 'Document Capture Date' is chosen, then the 'Document Capture Date' field will be based on the latest data transfer received from Hyland.

#### 2.1.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

#### 2.1.5 Counties Impacted

All counties will be impacted by the changes in this design.

#### 2.1.6 Security Updates

##### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A	N/A	N/A

##### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

#### 2.1.7 Report Usage/Performance

No impact to report usage or performance is expected from the changes outlined in this SCR.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Reports	Imaging – Document Capture Report Mockup	 Imaging Document Capture Report Moc

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.11	The CalSAWS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports.	The Imaging – Document Capture Report will be updated to better understand the data population based as described by the date field data points.

### 4.2 Migration Requirements

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

## 5 APPENDIX

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-242372

Update Imaging Report Date fields

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Susanna Martinez
	Reviewed By	Ravneet Bhatia, Thao Ta, Gokul Suresh

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
5/16/23	1.0	Initial Document	Susanna Martinez

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	5
2	Recommendations.....	5
	2.1 Imaging – Document Capture Report .....	5
	2.1.1 Overview .....	5
	2.1.2 Imaging – Document Capture Report Mockup.....	5
	2.1.3 Description of Change.....	9
	2.1.4 Report Location .....	10
	2.1.5 Counties Impacted .....	10
	2.1.6 Security Updates.....	10
	2.1.7 Report Usage/Performance .....	10
3	Supporting Documents .....	10
4	Requirements.....	11
	4.1 Project Requirements.....	11
	4.2 Migration Requirements.....	11
5	Appendix.....	11

# 1 OVERVIEW

---

The Imaging – Document Capture reporting data is based on the latest data transfer CSV file provided by Hyland. This transfer is currently set to be run nightly, thus the current day's reporting data for Imaging reports is as of the previous day.

Since the Hyland CSV file is based on the previous day's data and isn't processed by the report until the following day the 'Run Date' and 'Data as of' fields are causing confusion for workers and make it appear that the report is missing one day's worth of data. The 'Run Date' and 'Date as of' fields will need to be updated to better reflect the data population selected by the user.

## 1.1 Current Design

The 'Run Date' field is the date the report is ran by the user which will be defaulted to the current day's date. The 'Data as of' field is the Run Date that is provided in the Hyland CSV file.

For example, the Hyland CSV file for 6/29, containing the previous day's data from 6/28, is received and processed the night of 6/29. This data then becomes available in the report the next day on 6/30. In this example:

- 'Data as of' date displayed in the report is 6/29 which is the Run Date given in the file.
- 'Run Date' displayed in the report is the current date and would display as 6/30 when the user generates the report to see the latest data.

## 1.2 Requests

Update the 'Run Date' and 'Data as of' fields to better reflect the file processing date versus report generation date versus the date for the data population selected/displayed.

## 1.3 Overview of Recommendations

1. Update the 'Data as of' and 'Run Date' fields in the report to better reflect the file processing date versus report generation date versus the date for the data population selected/displayed.
2. Update the 'Office Number' column in the 'Staff Documents Captured' and 'External Documents Captured' sheets to be left aligned.
3. Rename the 'Begin Month' parameter to 'Document Capture Month'.
4. Rename the 'Begin Date' parameter to 'Document Capture Date'.
5. Rename the 'Begin Date' field on the 'External Documents Captured' sheet to 'Document Capture Date'.

- Update the 'Document Capture Date' field on the 'External Documents Captured' sheet to display the earliest 'Document Capture Date' chosen on the 'Report Filters' sheet.

## 1.4 Assumptions

- The reporting data will be based on the latest data transfer provided by Hyland. This transfer is currently set to be run nightly, thus the current day's reporting data for Imaging reports is as of the previous day. If the Hyland CSV file is received on 6/29 it is expected to have the data for the documents that were captured on 6/28. The file for 6/29 is processed the night of 6/29 and is made available in the report on 6/30.
- No changes to the Imaging – Exception Queues Aging Report or Imaging – Initial QA Report are required.

## 2 RECOMMENDATIONS

### 2.1 Imaging – Document Capture Report

#### 2.1.1 Overview

The Imaging – Document Capture Report displays the number of staff Documents captured by Type, and External Documents captured by location for the date range specified. This is an On Request curated report.

#### 2.1.2 Imaging – Document Capture Report Mockup

The screenshot shows the 'Report Filters' interface in CalSAWS. It features four filter columns: 'Document Capture Month', 'Document Capture Date', 'Office', and 'County'. Each column has a search icon and a dropdown arrow. The 'Document Capture Date' column is currently displaying a list of dates from 9/28/2021 to 10/15/2021. The 'Office' column shows a list of office codes from BA to LA. The 'County' column shows a list of California counties from Alameda to Mono. A 'Generate Results' button is located at the bottom of the filter area.

Document Capture Month	Document Capture Date	Office	County
Sep-21	9/28/2021		Alameda
Oct-21	9/27/2021	BA	Alpine
Nov-21	9/28/2021	BB	Amador
Dec-21	9/28/2021	BC	Butte
Jan-22	9/28/2021	BD	Calaveras
Feb-22	10/1/2021	BE	Colusa
Mar-22	10/3/2021	BF	Contra Costa
Apr-22	10/4/2021	BG	Del Norte
May-22	10/5/2021	BH	El Dorado
Jun-22	10/6/2021	BI	Fresno
Jul-22	10/7/2021	BJ	Glenn
Aug-22	10/8/2021	BK	Humboldt
Sep-22	10/10/2021	BL	Imperial
Oct-22	10/11/2021	BM	Inyo
Nov-22	10/12/2021	BN	Kern
Dec-22	10/13/2021	BO	Kings
Jan-23	10/14/2021	BP	Lake
Feb-23	10/15/2021	BQ	Lassen
Mar-23	10/17/2021	BR	Los Angeles
Apr-23	10/18/2021	BS	Madera
May-23	10/19/2021	BT	Marin
Jun-23	10/20/2021	BU	Mariposa
Jul-23	10/21/2021	BV	Mendocino
	10/22/2021	BX	Merced
	10/24/2021	BY	Modoc
	10/25/2021	LA	Mono

Figure 2.1.2 – Report Filters Sheet

Qlik ... Analyze Sheet Narrate Storytelling Imaging - Document Capture Report

Insight Advisor =Date(Month/REPO... Jun-23 COUNTY\_NAME Los Angeles

CaSAWS Staff Documents Captured

Return to Filters County Los Angeles Run Date 6/30/2023 Data Transferred Date 6/29/2023

Staff Documents Captured

Created By	Staff Name	Office Number	Number of Documents Captured	Number of Pages Captured	Single Case	Multi Case	SIU	Hearin...	RDB	Returned Mail	CWS	AAP	IHSS	QA/QC	Ignore Barcode	Import / Virtual Captured
<b>Totals</b>			<b>1316515</b>	<b>4048823</b>	<b>304968</b>	<b>496268</b>	<b>2749</b>	<b>0</b>	<b>0</b>	<b>44093</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>7378</b>	<b>0</b>
username	Lastname, Firstname	GN	7	17	0	7	0	0	0	0	0	0	0	0	0	0
username	Lastname, Firstname	GU	11789	29448	3022	8730	0	0	0	0	0	0	0	0	37	0
username	Lastname, Firstname	GV	7437	17839	0	7437	0	0	0	0	0	0	0	0	0	0

Figure 2.1.2.1 – Staff Documents Captured Sheet

CaSAWS External Documents Captured

Return to Filters County County Run Date 6/30/2023 Data Transferred Date 6/29/2023

External Documents Captured

Captured Source	Office Number	Number of Documents Captured	Number of Pages Captured
<b>Totals</b>		<b>52158</b>	<b>84619</b>
33 Moreno Valley Ser.Su.McHenry	-	259	894
36 Victorville TAD/WTVW/Chia Case/PRD	-	295	1095
33 Hemet Ser.Su.McHenry	-	231	826
34 SB TAD SA/WTVW/Chia Case/PRD	-	177	722
36 SB TAD 911/WTVW/Chia Case/PRD	-	166	535
38 HSA Main Office	-	145	520

Figure 2.1.2.2 – External Documents Captured Sheet



Figure 2.1.2.3 – Run Date Field Before Description Update

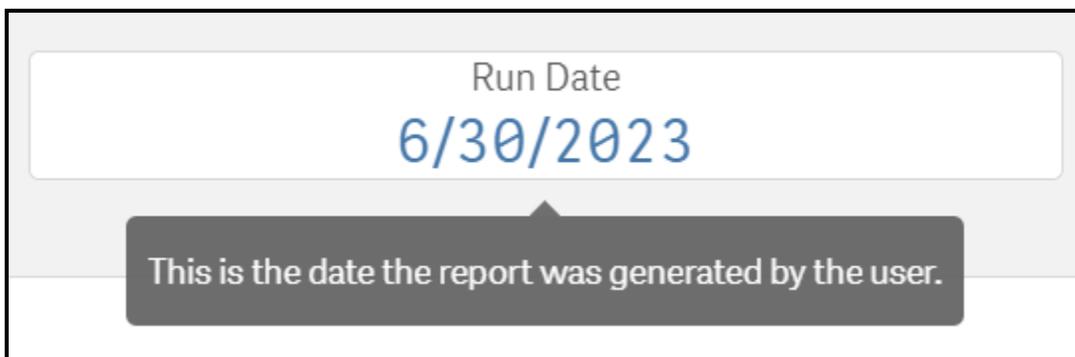


Figure 2.1.2.4 – Run Date Field After Description Update

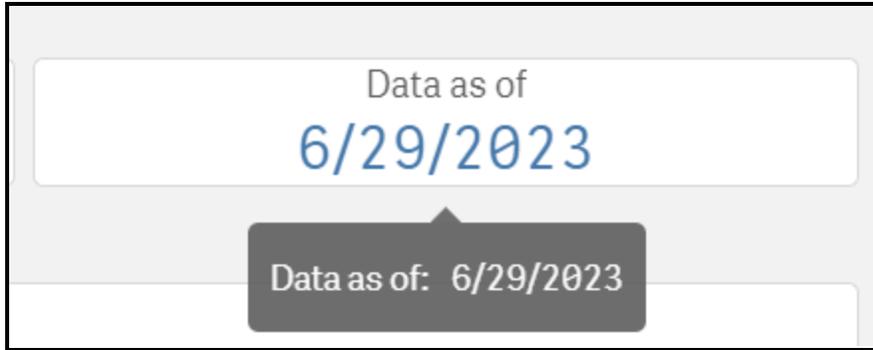


Figure 2.1.2.5 – Data as of Field Before Description and Rename Update

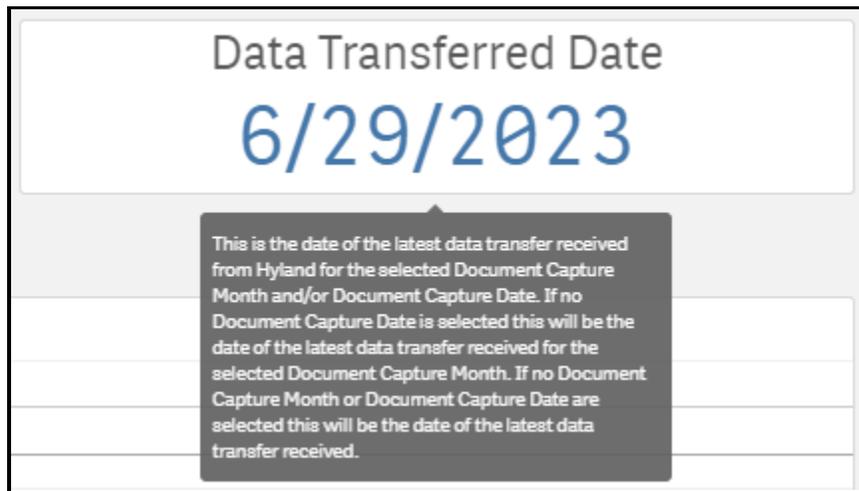


Figure 2.1.2.6 – Data as of Field After Description and Rename Update

Office Number	
WC	
WC	
WC	
	05
	51
	80
	04

Figure 2.1.2.7 – Office Number Column Formatting Before Update

Office Number
11
03
02
02
03
09
01
01

**Figure 2.1.2.8 – Office Number Column Formatting After Update**

CalSAWS Report Filters	
<input type="text" value="Begin Month"/>	<input type="text" value="Begin Date"/>
Sep-21	9/26/2021
Oct-21	9/27/2021

**Figure 2.1.2.9 – Begin Month and Begin Date Parameters Before Rename Update**

CalSAWS Report Filters	
<input type="text" value="Document Capture Month"/>	<input type="text" value="Document Capture Date"/>
Jun-22	6/30/2022

**Figure 2.1.2.10 – Begin Month and Begin Date Parameters After Rename Update**

Begin Date <span style="font-size: 1.2em; color: #0070C0;">6/28/2023</span>
--

**Figure 2.1.2.11 – Begin Date Field Before Rename Update**

Document Capture Date <span style="font-size: 1.2em; color: #0070C0;">6/28/2023</span>
---

**Figure 2.1.2.12 – Begin Date Field After Rename Update**

### 2.1.3 Description of Change

1. Update the 'Run Date' field on the 'Staff Documents Captured' and 'External Documents Captured' sheets to include a description when the user hovers over the field.
  - a. The 'Run Date' field description will read:

“This is the date the report was generated by the user.”
2. Rename the 'Data as of' field on the 'Staff Documents Captured' and 'External Documents Captured' sheets to 'Data Transferred Date'.
3. Update the 'Data Transferred Date' field on the 'Staff Documents Captured' and 'External Documents Captured' sheets to include a description when the user hovers over the field.
  - a. The 'Data Transferred Date' field description will read:

“This is the date of the latest data transfer received from Hyland for the selected Document Capture Month and/or Document Capture Date. If no Document Capture Date is selected this will be the date of the latest data transfer received for the selected Document Capture Month. If no Document Capture Month or Document Capture Date are selected this will be the date of the latest data transfer received.”
4. Update the 'Office Number' column on the 'Staff Documents Captured' and 'External Documents Captured' sheets to be left aligned.
5. Rename the 'Begin Month' parameter to 'Document Capture Month' on the 'Report Filters' sheet.
6. Rename the 'Begin Date' parameter to 'Document Capture Date' on the 'Report Filters' sheet.
7. Rename the 'Begin Date' field to 'Document Capture Date' on the 'External Documents Captured' sheet.
8. Change the 'Document Capture Date' field on the 'External Documents Captured' sheet to display the minimum 'Document Capture Date' based on the 'Document Capture Date' parameter values selected on the 'Report Filters' sheet.
  - a. For example, if the user selects the 'Document Capture Date' parameter values of '6/26/2023', '6/27/2023' and '6/29/2023' then the 'Document Capture Date' field value will display the '6/26/2023' date.

**Note:** If no 'Document Capture Date' parameter is selected on the 'Report Filters' sheet then the 'Document Capture Date' field will be based on the latest data transfer received from Hyland for the selected 'Document Capture Month'. If no 'Document Capture Month' and no 'Document Capture Date' is chosen, then the 'Document Capture Date' field will be based on the latest data transfer received from Hyland.

#### 2.1.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Administrative**

#### 2.1.5 Counties Impacted

All counties will be impacted by the changes in this design.

#### 2.1.6 Security Updates

##### 1. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A	N/A	N/A

##### 2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

#### 2.1.7 Report Usage/Performance

No impact to report usage or performance is expected from the changes outlined in this SCR.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Reports	Imaging – Document Capture Report Mockup	 Imaging Document Capture Report Moc

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.11	The CalSAWS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports.	The Imaging – Document Capture Report will be updated to better understand the data population based as described by the date field data points.

### 4.2 Migration Requirements

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

## 5 APPENDIX

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-248015

Update SOC 808 Quarterly Report for San  
Mateo and Sacramento County

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia; Gokul Suresh

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/15/2023	1.0	Initial version	Esequiel Herrera-Ortiz

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	5
	1.3 Overview of Recommendations.....	5
	1.4 Assumptions .....	5
2	Recommendations.....	6
	2.1 SOC 808 .....	6
	2.1.1 Overview .....	6
	2.1.2 SOC 808 (Multicounty) Screenshot.....	6
	2.1.3 Description of Change.....	7
	2.1.4 Report Location .....	9
	2.1.5 Counties Impacted .....	9
	2.1.6 Security Updates.....	10
	2.1.7 Report Usage/Performance .....	10
3	Supporting Documents .....	11
4	Requirements.....	12
	4.1 Project Requirements.....	12
	4.2 Migration Requirements.....	12
5	Migration Impacts .....	13
6	Appendix.....	14

# 1 OVERVIEW

---

Sacramento and San Mateo administer the CAPI program for several counties. A modified version of the SOC 808 will be created for Sacramento and San Mateo to allow them to distinguish the counts for each of their administered counties.

Currently Sacramento and San Mateo administer the CAPI cases for the following counties:

Sacramento		San Mateo
<ul style="list-style-type: none"><li>• Alpine</li><li>• Amador</li><li>• Butte</li><li>• Calaveras</li><li>• Colusa</li><li>• Del Norte</li><li>• El Dorado</li><li>• Glenn</li><li>• Humboldt</li><li>• Lake</li><li>• Lassen</li><li>• Mendocino</li><li>• Modoc</li><li>• Nevada</li></ul>	<ul style="list-style-type: none"><li>• Orange</li><li>• Placer</li><li>• Plumas</li><li>• Sacramento</li><li>• San Joaquin</li><li>• Santa Barbara</li><li>• Shasta</li><li>• Sierra</li><li>• Siskiyou</li><li>• Sutter</li><li>• Tehama</li><li>• Trinity</li><li>• Yolo Yuba</li></ul>	<ul style="list-style-type: none"><li>• Alameda</li><li>• Contra Costa</li><li>• Marin</li><li>• Merced</li><li>• Monterey</li><li>• San Mateo</li><li>• Santa Cruz</li><li>• Solano</li><li>• Sonoma</li><li>• Stanislaus</li></ul>

For example, if a person that resides in Alpine applies for CAPI Sacramento will create a case within their county where the case has the county set to Sacramento, but the person's residency will be equal to Alpine. This applies to Recovery Accounts.

Technical Note:

CASE.COUNTY\_CODE = 34 (Sacramento)

RECOV\_ACCT.COUNTY\_CODE = 34 (Sacramento)

RES.COUNTY\_CODE = 02 (Alpine)

## 1.1 Current Design

The SOC 808 is designed to generate in CalSAWS for the county administering its CAPI program. The SOC 808 is not generated for the county that administers CAPI programs for other counties.

## 1.2 Requests

Create a modified version of the SOC 808 for Sacramento and San Mateo that distinguishes the data for each of their administered counties. This change will not impact the version of the SOC 808 used by all other counties.

## 1.3 Overview of Recommendations

1. Create a modified version of the SOC 808 for Sacramento and San Mateo. The report is a combined version of the SOC 808 and the SOC 808 Backup Report. The report is modified to account for cases which change residency between two counties that are both administered by the same administering county within the report quarter.
  - a. The report includes a 'SOC 808' (sheet) which displays a separate copy of the state form for each county that Sacramento or San Mateo administers.
  - b. All the detail sheets include a county of residence column which will allow the counties to filter the data by an administered county.
2. Disable the original version of the SOC 808 and the SOC 808 Backup Report for San Mateo and Sacramento County.

## 1.4 Assumptions

1. With **CA-248019 CAPI – Update Residency Detail page ‘County of Residence’**, San Mateo and Sacramento will have the ability to store the county of residency which will allow the SOC 808 (Multicounty) to generate for the administered counties.
2. The changes outlined in this SCR will not impact the version of the SOC 808 and SOC 808 Backup Report used by all other counties. A new multicounty version of the SOC 808 will be created for Sacramento and San Mateo which can filter the data by each county a case resides in. The existing logic for the base population logic and column logic will remain the same unless otherwise specified in this document.
3. If a CAPI case administered by Sacramento or San Mateo does not have a county of residence, then it will be reported as having a county of 'Other'. If San Mateo and Sacramento assign a county of residence to a person for a county they do not administer, then a state form will be generated for that county as well. There is nothing that prevents Sacramento or San Mateo from assigning a person any county of residency.
4. Sacramento and San Mateo will populate the Residency page for people who reside within their own county. This allows the report to generate a 'SOC 808' (sheet) for their own county.

## 2 RECOMMENDATIONS

### 2.1 SOC 808

#### 2.1.1 Overview

The SOC 808 is a quarterly report of overpayments and collection for the Cash Assistance Program for Immigrants (CAPI).

The multicounty version of the SOC 808 is generated for Sacramento and San Mateo to capture data for each of the counties they administer CAPI for. The report also provides a state form for each of their administered counties.

#### 2.1.2 SOC 808 (Multicounty) Screenshot

COMMENTS		
CONTACT PERSON (Print)	TELEPHONE (       )	DATE COMPLETED
TITLE/CLASSIFICATION	FAX (       )	
STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		
CALIFORNIA DEPARTMENT OF SOCIAL SERVICES DATA SYSTEMS AND SURVEY DESIGN BUREAU		
<b>Quarterly Report of Overpayments and Collections for the Cash Assistance Program for Immigrants (CAPI)</b>		SEND ONE COPY OF THIS REPORT TO: California Department of Social Services Data Systems and Survey Design Bureau, M.S. 9-081 P.O. Box 944243 Sacramento, CA 94244-2430 FAX: (916) 657-2074
COUNTY NAME Contra Costa	CONSORTIUM	REPORT QUARTER AND YEAR 01/2023
<b>PART A. CASELOAD MOVEMENT - ADDITIONS</b>	<b>CLAIMS (A)</b>	<b>AMOUNTS (B)</b>
1. Overpayments carried forward from the end of last quarter (Item 1a plus Item 1b).....	1 0	2 \$0.00
a. Item 12 Claims/Item 17 Amounts from last quarter.....	3 0	4 \$0.00
b. Adjustment to Item 1a (positive or negative number).....	5 0	6 \$0.00
2. New overpayment notices sent during the quarter.....	7 0	8 \$0.00
3. Overpayments transferred from other counties during the quarter.....	9 0	10 \$0.00
4. Other overpayment additions during the quarter (explain in Comments).....	11	12
5. Total overpayments (Items 1 through 4).....	13 0	14 \$0.00
<b>PART B. CASELOAD MOVEMENT - SUBTRACTIONS</b>	<b>CLAIMS (A)</b>	<b>AMOUNTS (B)</b>
6. Overpayments transferred to other counties during the quarter.....	15 0	16 \$0.00
7. Overpayments not pursued during the quarter.....	17 0	18 \$0.00

See the attached mockup in the Supporting Document section.

**Note:** For Sacramento and San Mateo, the SOC 808 (sheet) scrolls vertically to show a copy of the state form for each of their administered counties.

### 2.1.3 Description of Change

1. Create a multicounty version of the SOC 808. The report inherits the same base population logic and column definitions as the original SOC 808 used by all other counties, unless otherwise mentioned below. The report is titled SOC 808 (Multicounty). The report is generated only for Sacramento and San Mateo.
2. Create a modified version of the 'SOC 808' (sheet) that dynamically create separate state forms with case level counts for each of the administered counties. If a CAPI case administered by Sacramento or San Mateo does not have a county of residence, then it will be reported as having a county of 'Other'. If a case had a county of residency that is not administered by Sacramento or San Mateo, then we will still generate a form for that county. See the attached mockup in the Supporting Documents section below.
3. The COUNTY NAME and COUNTY CODE on each form within the 'SOC 808' (sheet) to display the resident county of the CAPI case. Currently, only the administering county name and code are displayed, for either Sacramento or San Mateo.

Field	Description
COUNTY NAME	Display in COUNTY NAME, on the state form, the county of residency for the CAPI cases. The field will display 'Other' for cases which do not have a county of residence.
COUNTY CODE	Display in COUNTY CODE, on the state form, of the county of residency for CAPI cases (CT-15). The field will be blank for cases which do not have a county of residence.

4. Update the existing logic of the SOC 808 report logic to account for cases which change residency from one CAPI administered county to another CAPI administered county where both counties are administered by the same county. An example of this is if a case changes residency from Alpine which is administered by Sacramento to Amador which is also administered by Sacramento. Being administered by the same county means the cases have the same county code but the residency are two separate counties. This does not apply to Inter County Transfers (ICTs). The existing logic already accounts for ICTs.

#### Part A

- a. If a Recovery Account is reported on **Line 12. Balance of overpayment claims at the end of the quarter** in the prior report

quarter for County A and the case then changes residency to County B as of the last day of the report quarter, then the Recovery Account will be reported as follows:

- i. County A – The Recovery Account and amount will be reported under **Line 1a. Item 12 Claims/Item 17 Amounts from last quarter** with the same amount that was reported in the prior quarter. The Recovery Account will also be reported on **Line 6. Overpayments transferred to other counties** with the same amount that was reported in the prior quarter. This will cause the claim and amount to zero out on the report. The Recovery Account will also appear in the corresponding 'Line 1' and 'Line 6' detail sheets.
- ii. County B – Reports the Recovery Account and amount under **Line 3. Overpayments transferred from other counties during the quarter** with the same amount that was reported in the prior quarter. The record should appear in the 'Line 3' detail sheet as well. Any transaction that was posted to the Recovery Account during the report quarter is reported using the existing logic.

5. The totals on the 'SOC 808' (sheet) capture data for only the cases residing in the CAPI administered county that the sheet pertains to as of the last day of the report quarter. The totals filter data based on the CAPI administering county administering the case, followed by the county in which the program person (with a role of Member) resides in as of the last day of the report quarter. Currently the totals capture all records based on the county administering the case.

6. Add a 'County of Residence in Prior Quarter' column to the following sheets:
- a. Line 1
  - b. Line 6

See the attached mockup in the Supporting Documents Section for column placement.

Column Name	Description
County of Residence in Prior Quarter	Displays the county name of residency for the <b>Member</b> on the CAPI program as of the last day of the prior report quarter. The field will display 'Other' for cases which did not have a county of residence.

	Technical Note: This is the decoded value of RES.COUNTY_CODE.
--	---

7. Add a 'County of Residence' column to the following sheets:
  - a. Line 1b
  - b. Line 2
  - c. Line 3
  - d. Line 7
  - e. Line 8
  - f. Line 9
  - g. Line 13
  - h. Line 14
  - i. Line 15

See the attached mockup in the Supporting Documents Section for column placement.

Column Name	Description
County of Residence	<p>Displays the county name of residency for the <b>Member</b> on the CAPI program as of the last day of the report quarter. The field will display 'Other' for cases which do not have a county of residence.</p> <p>Technical Note: This is the decoded value of RES.COUNTY_CODE.</p>

8. Disable the original version of the SOC 808 and the SOC 808 Backup Report for San Mateo and Sacramento County. All historical version of the report will remain accessible if any exist.

#### 2.1.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: State**

#### 2.1.5 Counties Impacted

San Mateo and Sacramento County are directly impacted by the changes outlined in this section, with another 35 counties indirectly impacted.

### **2.1.6 Security Updates**

1. The SOC 808 (Multicounty) report version will use the same rights as the original SOC 808 and SOC 808 Backup Detail. No new security rights, groups, or roles will be created.

### **2.1.7 Report Usage/Performance**

No notable impact to the system's performance is expected with the implementation of this section.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Reports	SOC 808 (Multicounty)	 SOC 808 Mockup.xlsx

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.2	The LRS shall produce reports that provide the detail LRS Data that will be used to complete the reports required by federal, state, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	This SCR will provide Sacramento and San Mateo the summary and detail data for the SOC 808 which is a state mandated report.

### 4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

# 5 MIGRATION IMPACTS

---

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CA-248015			No Impact		

## 6 APPENDIX

---

None

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-249570

Task Mgmt: Automated Action for Active  
MC/CWS Individuals

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Carlos Albances, Dymas Pena, Sarah Rich, Maggie Orozco-Vega, Elisa Miller, Renee Gustafson, Cynthia Ridley

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/02/2023	1.0	Initial Revision	Vallari Bathala

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Medi-Cal Person: Active on Child Welfare Services Program Automated Action 5	
	2.1.1 Overview .....	5
	2.1.2 Automated Action Detail Mockup .....	5
	2.1.3 Description of Changes .....	5
	2.1.4 Page Validations .....	6
	2.1.5 Page Location .....	6
	2.1.6 Security Updates.....	7
	2.1.7 Page Mapping.....	7
	2.1.8 Page Usage/Data Volume Impacts .....	7
	2.2 Medi-Cal Person: Active on Child Welfare Services Program Automated Action Batch Job.....	7
	2.2.1 Overview .....	7
	2.2.2 Description of Change.....	7
	2.2.3 Execution Frequency.....	7
	2.2.4 Key Scheduling Dependencies .....	7
	2.2.5 Counties Impacted .....	8
	2.2.6 Category .....	8
	2.2.7 Data Volume/Performance.....	8
	2.2.8 Failure Procedure/Operational Instructions.....	8
3	Supporting Documents .....	9
4	Requirements.....	10
5	Migration Impacts .....	11
6	Outreach.....	12
7	Appendix.....	13

# 1 OVERVIEW

---

This design describes the creation of an Automated Action that will create a Task when an individual is Active on both a Medi-Cal program and a Child Welfare Services (CWS) program.

## 1.1 Current Design

There is no Automated Action to create a Task informing workers to review/close Medi-Cal for an individual who has moved into a CWS program: Foster Care (FC), Kin-GAP (KG), or Adoption Assistance (AAP). CWS programs include cash-based Medi-Cal.

When an individual is active on a Medi-Cal program in one case, then moved to a CWS program on another case, CalSAWS does not automatically create a Task to discontinue the individual's Medi-Cal eligibility, so the individual receives duplicate Medi-Cal.

## 1.2 Requests

1. Add a "Create Task" Automated Action that is triggered for worker review of Medi-Cal for individuals who are also Active members on a CWS program in another case for 30 days or more.

## 1.3 Overview of Recommendations

1. Implement an Automated Action to be invoked when an active Medi-Cal individual is Active on a CWS program on another case for 30 days or more.
2. Implement a new Batch process to run daily and invoke the "Medi-Cal Person: Active on Child Welfare Services Program" Automated Action.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

### 2.1 Medi-Cal Person: Active on Child Welfare Services Program Automated Action

#### 2.1.1 Overview

This section outlines the modifications required to support a new Automated Action in the CalSAWS System.

#### 2.1.2 Automated Action Detail Mockup

### Automated Action Detail

Edit Close

Action Information		
<b>Name:</b> Medi-Cal Person: Active on Child Welfare Services Program	<b>Type:</b> Create Task	<b>Status: *</b> Inactive
<b>Program(s):</b> MC	<b>Run Date:</b> Daily(Mon-Sat)	<b>Source:</b> Batch
<b>Scenario:</b> An active Medi-Cal individual is Active on a Child Welfare Services (CWS) program (FC, KG, AAP) for 30 days or more.		

Task Information	
<b>Task Type: *</b>	
<b>Due Date:</b> Default Due Date	<b>Default Due Date:</b> 5 Business days
<b>Initial Assignment:</b> Default Assignment	<b>Default Assignment:</b> Current Program Worker
<b>Sibling Assignment:</b> No	
<b>Guided Navigation: *</b> No	
<b>Long Description:</b> An Active Medi-Cal individual is Active on a CWS program (FC,KG,AAP).	

Edit Close

Figure 2.2.2.1 – Automated Action Detail

#### 2.1.3 Description of Changes

Implement a Medi-Cal Person: Active on Child Welfare Services Program Automated Action as follows:

1. Medi-Cal Person: Active on Child Welfare Services Program
  - a. Action Information
    - i. Name: Medi-Cal Person: Active on Child Welfare Services Program
    - ii. Type: Create Task
    - iii. Status: Inactive
    - iv. Program(s): MC
    - v. Run Date: Daily (Mon-Sat)
    - vi. Source: Batch
    - vii. Scenario: An active Medi-Cal individual is Active on a Child Welfare Services (CWS) program (FC, KG, AAP) for 30 days or more.

The Automated Action will have an initial status of Inactive and a blank Task Type. If a county Activates an Automated Action, a Task Type will be required at that time.

- b. Task Information
  - i. Task Type: BLANK
  - ii. Task Sub-Type: BLANK
  - iii. Due Date: Default Due Date
  - iv. Default Due Date: 5 business days
  - v. Initial Assignment: Default Assignment
  - vi. Default Assignment: Current Program Worker
  - vii. Sibling Assignment: No
  - viii. Guided Navigation: No
  - ix. Long Description: An Active Medi-Cal individual is Active on a CWS program (FC, KG, AAP).

#### 2.1.4 Page Validations

N/A

#### 2.1.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
  - Click on the hyperlink of the "Medi-Cal Person: Active on Child Welfare Services Program " Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
  - The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

### **2.1.6 Security Updates**

N/A

### **2.1.7 Page Mapping**

N/A

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

N/A

## **2.2 Medi-Cal Person: Active on Child Welfare Services Program Automated Action Batch Job**

### **2.2.1 Overview**

1. This section describes the behavior of a new batch process that will invoke the "Medi-Cal Person: Active on Child Welfare Services Program" Automated Action.

### **2.2.2 Description of Change**

Implement a new batch process to run daily and invoke the "Medi-Cal Person: Active on Child Welfare Services Program" Automated Action. It will be invoked when at least one individual is an Active Member on both a CWS program (FC/KG/AAP) and Medi-Cal program for the come-up month, and this same individual has been an Active Member in the CWS program consecutively for 30 or more calendar days prior to the batch date. The resulting Task will be associated to the Medi-Cal program. If the Medi-Cal program already has a Task in an Assigned or In-Process status that resulted from this Automated Action, processing will not create an additional Task.

### **2.2.3 Execution Frequency**

The batch job will be scheduled to run daily, excluding Sundays and Holidays.

### **2.2.4 Key Scheduling Dependencies**

None.

### **2.2.5 Counties Impacted**

All CalSAWS Counties.

### **2.2.6 Category**

Non-Core.

### **2.2.7 Data Volume/Performance**

There are no expected data volume/performance concerns.

### **2.2.8 Failure Procedure/Operational Instructions**

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

### 3 SUPPORTING DOCUMENTS

---

N/A

## 4 REQUIREMENTS

---

N/A

## 5 MIGRATION IMPACTS

---

N/A

## 6 OUTREACH

---

N/A

## 7 APPENDIX

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-250804

Update Forms that generate from EDBC to Hide  
the Details button



## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	5
	1.3 Overview of Recommendations.....	5
	1.4 Assumptions .....	5
2	Recommendations.....	6
	2.1 Update the Form Detail button to be hidden when the Form is in a Preview status.....	6
	2.1.1 Overview .....	6
	2.1.2 Hide the 'Form Detail' Button until EDBC is saved.....	6
3	Requirements.....	7
	3.1 Project Requirements.....	7

# 1 OVERVIEW

## 1.1 Current Design

CA-223587 updated the framework for Forms generated via EDBC with additional functionality, such as the ability to be previewed and authorized. The following Forms were updated with this functionality:

Form Number (TEMPL_NUM_IDENTIF)	Languages
AR 2	EN, SP
AR 2 SAR	EN, SP
CW 2211	EN, SP, AE, CA, CH, KO, RU, TG, VI
CW 2212	EN, SP, AE, CA, CH, KO, RU, TG, VI
CW 2215	English
SAR 2*	EN, SP, Threshold

Currently, when a Form is generated via Run EDBC, the Details button is available at NOA EDBC Preview.

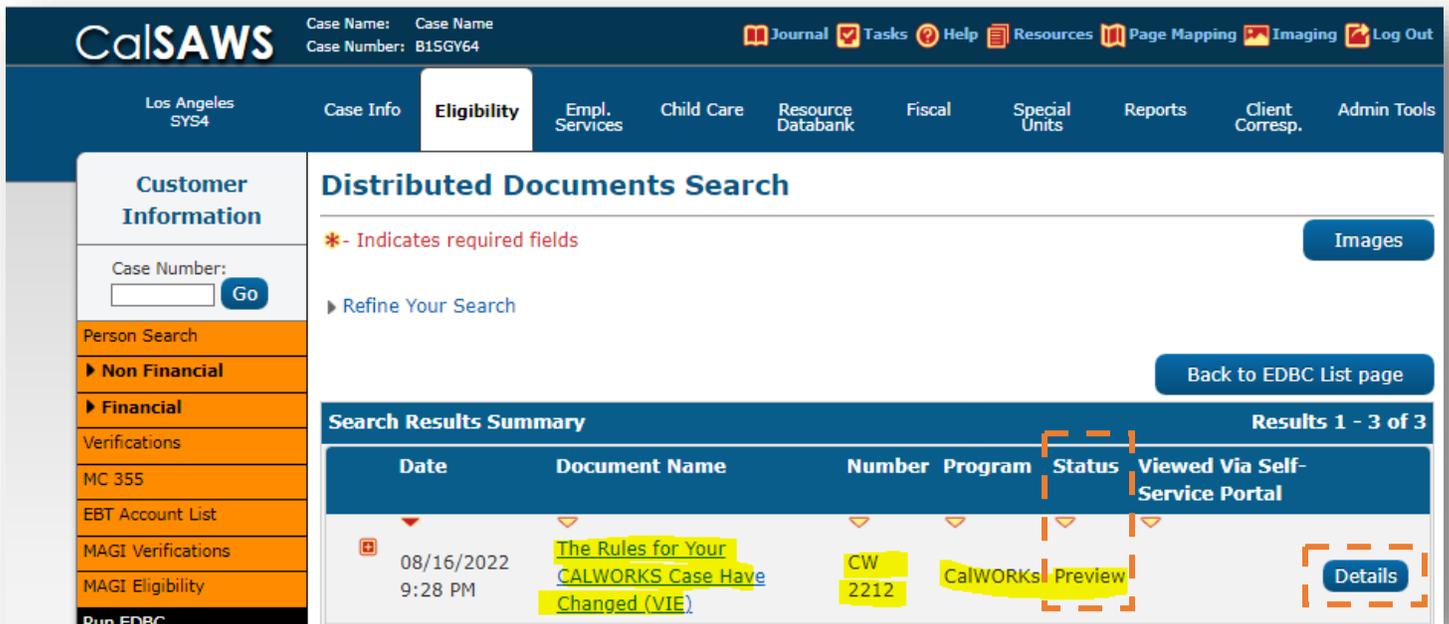


Figure 1.1.1 – 'Details' Button appears for Preview Forms from EDBC

This button allows the worker to make certain changes to a Form (for example, Electronic Signature) prior to EDBC being Saved, leaving room for potential issues if the EDBC is later rejected or re-run.

## **1.2 Requests**

1. Update the Form Detail button to be hidden when the Form is in a 'Preview' status.

## **1.3 Overview of Recommendations**

1. Update the Form Detail button to be hidden when the Form is in a Preview status.

## **1.4 Assumptions**

1. The inventory of Forms that can generate via Run EDBC will not be updated with this change.
2. No other changes to the Forms framework will be made with this change.
3. Journal entries for Forms that generate via EDBC will be updated with future SCR CA-250805.
4. This change will only affect Forms generated via Run EDBC; Functionality for Notices of Action will not be altered with this change.
5. While current Forms generated via EDBC are listed in the 'Current Design' section of this SCR, this update will also apply to future Forms generated via Run EDBC.
6. When an EDBC has been 'Saved and Continued' and a Form(s) has been set to a 'Pending Print Central' status, the 'Details' button will continue to be visible.

## 2 RECOMMENDATIONS

### 2.1 Update the Form Detail button to be hidden when the Form is in a Preview status

#### 2.1.1 Overview

The 'Details' button will not be visible until the EDBC is 'Saved and Continued' and the Form(s) is no longer in 'Preview' status.

#### 2.1.2 Hide the 'Form Detail' Button until EDBC is saved

The screenshot shows the CalSAWS interface. The top navigation bar includes 'Case Name: Case Name' and 'Case Number: B15GY64'. The main navigation menu has tabs for 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar contains 'Customer Information' with a 'Case Number' field and a 'Go' button, and a list of search options including 'Person Search', 'Non Financial', 'Financial', 'Verifications', 'MC 355', 'EBT Account List', 'MAGI Verifications', 'MAGI Eligibility', and 'Run EDBC'. The main content area is titled 'Distributed Documents Search' and includes a search bar, a 'Refine Your Search' link, and a 'Back to EDBC List page' button. Below the search bar is a 'Search Results Summary' section with 'Results 1 - 3 of 3'. The search results table is as follows:

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
08/16/2022 9:28 PM	The Rules for Your CALWORKS Case Have Changed (VIE)	CW 2212	CalWORKs	Preview	

**Figure 2.1.1 – 'Details' button is hidden while Form in 'Preview' Status**

If a Form generated via Run EDBC has a status of 'Preview', hide the 'Details' button on the right-hand side.

After 'Save and Continue', the Details button will be visible and interactable.

**Note:** When an EDBC has been 'Saved and Continued' and a Form(s) has been set to a 'Pending Print Central' status, the 'Details' button will continue to be visible (See Assumption #6).

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1233	The CalSAWS shall replace any pending notice, NOA, or form triggered by a case action which is subsequently changed and authorized prior to the generation of the notice, NOA, or form.	CalSAWS will not allow changes to a pending form via the 'Details' button until the case action is authorized.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-252048

Add E-Sign Functionality to LA County Additional  
CalSAWS Forms

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Lalitha Valamarthi
	Reviewed By	Priya Sridharan

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
07/13/2023	1.0	Original	Lalitha Valamarthi
07/24/2023	1.1	Adding new requirements	Lalitha Valamarthi

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	4
	2.1 Update and Add Mailing Coversheet Form .....	4
	2.1.1 Overview .....	4
	2.1.2 Description of Change.....	4

# 1 OVERVIEW

---

The purpose of this change is to Update the E-Sign Functionality to LA County Additional CalSAWS Forms.

## 1.1 Current Design

Currently the E-Signature functionality is not available for all required LA county forms.

## 1.2 Requests

Add E-Sign functionality to the requested LA Forms and make the non-state form CSF 100 visible for L.A. County.

## 1.3 Overview of Recommendations

1. Add E-Sign functionality to the requested LA Forms.
2. Make the non-state form CSF 100 visible for L.A. County.
3. Update the program drop-down on the Document Parameters page for the GN 6135, GN 6137B, and PA 1913.
4. Update form PA 1913 to add a coversheet.

## 1.4 Assumptions

1. Form Names and Form numbers will not be updated with this SCR. The only changes for the forms identified will be the addition of E-signature functionality.
2. Adding E-Sign to the forms will give users the ability to do both E-sign and Telephonic signature.

# 2 RECOMMENDATIONS

---

## 2.1 Add E-Sign functionality to the requested LA Forms

### 2.1.1 Overview

This section will cover the updates needed to update the E-Sign functionality to the below requested LA county Forms.

### 2.1.2 Description of Change

1. Perform a DCR to DOC\_TEMPL to update the values for ESIGN\_IND for the forms listed below.

- ABP 1676-2

- ABP 1676-4 GRMH
- CW 86-LA
- GN 6006A
- GN 6006B
- GN 6006C
- GN 6006D
- GN 6135
- GN 6137
- GN 6137A
- GN 6137B
- GN 6372
- GR 21
- GR 6
- PA 146
- PA 167
- PA 1815
- PA 1913
- PA 2124
- PA 6011
- PA 6012
- PA 6056
- PA 908
- REP 3

**Note:** The 'Signature Method' drop-down on the 'electronic Signature' Page will show 'IVR/Text and Telephonic' after enabling the ESIGN\_IND to 'Y'.

2. Perform a DCR to DOC\_TEMPL to update the value for TEMPL\_COUNTY\_CATGRY of the non-state form CSF 100 to be visible for all counties, including LA County.
3. Update the program drop-down on the Document Parameters page for the GN 6135, GN 6137B, and PA 1913.
  - a. Add WTW in addition to the currently available programs in the Program field on the Document Parameters page for the GN 6135.
  - b. Add REP in addition to the currently available programs in the Program field on the Document Parameters page for the GN 6137B.
  - c. Add WTW, REP, and CalWORKs to the Program field on the Document Parameters page for the PA 1913.
4. Update form PA 1913 to add a CSF 147 coversheet and add the print options.
  - a. Add the mailing coversheet CSF 147 to the form PA 1913.
  - b. Include the following parameters for the packet on the Document Parameters page:

**Technical Note:** The name of the document parameter is Standard.jsp.

- i. Case Number
- ii. Customer Name
- iii. Program
- iv. Language

c. The packet has the following print options:

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

- I. The 'Print Local without Save' option is only available when a blank template is generated.
- II. The 'Print and Save' options are only available when generating the packet in the context of the case.

d. Add the following barcode options to the form PA 1913

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

**Mailing Requirements:**

Mail-To (Recipient): The Individual selected on the 'Customer Name' dropdown on the Document parameter page.  
 Mailed From (Return): Program Worker's Office Address  
 Mail-back-to Address: N/A  
 Outgoing Envelope Type: Standard  
 Return Envelope Type: N/A

**Additional Requirements:**

Special Paper Stock: N/A

Enclosures: N/A

Clock Indicator: N

Electronic Signature: Yes

Post to Self Service Portal: Yes

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-254638

Add NOA Fragments in Threshold Languages for  
Medi-Cal NOA Generation (MC 239 V)

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Singaram Manickam
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
07/14/2023	1.0	Initial Document	Singaram Manickam

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add Threshold languages to reason code M092A. ....	5
	2.1.1 Overview .....	5
	2.1.2 Form/NOA Verbiage .....	5
	2.1.3 Form/NOA Variable Population .....	5
	2.1.4 Form/NOA Generation Conditions.....	5
3	Supporting Documents .....	6
4	Requirements.....	6
	4.1 Project Requirements.....	6

# 1 OVERVIEW

---

The purpose of this change is to add NOA Fragments in Threshold Languages for Medi-Cal NOA generation (MC 239 V).

## 1.1 Current Design

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

## 1.2 Requests

Add Threshold languages to NOA with reason code M092A (Snippet ID - 6544).

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

## 1.3 Overview of Recommendations

Add Threshold languages to Medi-Cal NOA Generation (MC 239 V) with reason code M092A (Snippet ID - 6544).

**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 reason code M092A.

#### 2.1.1 Overview

Add Threshold languages to reason code M092A.

**Reason Fragment Name and ID:**

MC\_AP\_INDIV\_OVER\_21\_IN\_MENTAL\_HLTH\_M092  
(Fragment ID: 6544)

**State Form/NOA:** MC 239 V

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medical

**Current Action Type:** Approval

**Include NA Back 9:** Yes

**Existing Languages:** English & Spanish

#### 2.1.2 Form/NOA Verbiage

Add MC 239 V 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

#### 2.1.3 Form/NOA Variable Population

No updates to variable population.

#### 2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	MC 239 V 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"> <li>a. Appointment notices;</li> <li>b. RedeDenial, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> </ul>	M092A NOA Code is being added in available Threshold languages.

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

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-254701

Add NOA Fragments in Threshold Languages for  
Medi-Cal NOA Generation (MC\_239\_V002)

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

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
06/19/2023	1.0	Initial Document	Dinesh Kumar Mariyappan

## Table of Contents

1	Overview .....	6
	1.1 Current Design.....	6
	1.2 Requests.....	6
	1.3 Overview of Recommendations.....	7
	1.4 Assumptions .....	7
2	Recommendations.....	8
	2.1 Add threshold Language for the MC_DN_NO_LINKAGE_M325 Denied with reason code M325D.....	8
	2.1.1 Overview .....	8
	2.1.2 Form/NOA Verbiage .....	8
	2.1.3 Form/NOA Variable Population .....	8
	2.1.4 Form/NOA Generation Conditions.....	8
	2.2 Add threshold Languages for the Did not Cooperate in Medical Support with a reason code M424D.....	9
	2.2.1 Overview .....	9
	2.2.2 Form/NOA Verbiage .....	9
	2.2.3 Form/NOA Variable Population .....	9
	2.2.4 Form/NOA Generation Conditions.....	9
	2.3 Add threshold Languages for the Failed to provide Name/Identity with a reason code M423D.....	10
	2.3.1 Overview .....	10
	2.3.2 Form/NOA Verbiage .....	10
	2.3.3 Form/NOA Variable Population .....	10
	2.3.4 Form/NOA Generation Conditions.....	10
	2.4 Add threshold languages for the Did not apply for Unemployment Insurance Benefits with a reason code M418D. ....	11
	2.4.1 Overview .....	11
	2.4.2 Form/NOA Verbiage .....	11
	2.4.3 Form/NOA Variable Population .....	11
	2.4.4 Form/NOA Generation Conditions.....	11
	2.5 Add threshold languages for the Did not apply for Medicare with a reason code M421D. ....	12
	2.5.1 Overview .....	12
	2.5.2 Form/NOA Verbiage .....	12
	2.5.3 Form/NOA Variable Population .....	12

2.5.4	Form/NOA Generation Conditions.....	12
2.6	Add threshold languages for the Failed to provide Third Party Liability with a reason code M421D.....	13
2.6.1	Overview .....	13
2.6.2	Form/NOA Verbiage .....	13
2.6.3	Form/NOA Variable Population .....	13
2.6.4	Form/NOA Generation Conditions.....	13
2.7	Add threshold languages for the Did not apply for Retirement with a reason code M416D. ....	14
2.7.1	Overview .....	14
2.7.2	Form/NOA Verbiage .....	14
2.7.3	Form/NOA Variable Population .....	14
2.7.4	Form/NOA Generation Conditions.....	14
2.8	Add threshold languages for the Did not apply for State Disability Insurance with a reason code M417D. ....	15
2.8.1	Overview .....	15
2.8.2	Form/NOA Verbiage .....	15
2.8.3	Form/NOA Variable Population .....	15
2.8.4	Form/NOA Generation Conditions.....	15
2.9	Add threshold languages for the Did not apply for Disability Insurance Benefits with a reason code M414D. ....	16
2.9.1	Overview .....	16
2.9.2	Form/NOA Verbiage .....	16
2.9.3	Form/NOA Variable Population .....	16
2.9.4	Form/NOA Generation Conditions.....	16
2.10	Add threshold languages for the Did not apply for Veteran benefits with a reason code M419D.....	17
2.10.1	Overview .....	17
2.10.2	Form/NOA Verbiage .....	17
2.10.3	Form/NOA Variable Population .....	17
2.10.4	Form/NOA Generation Conditions.....	17
2.11	Add threshold languages for the MC_TN_PERS_NOT_LNKD_PROG_M028 with a reason code M028T.....	18
2.11.1	Overview .....	18
2.11.2	Form/NOA Verbiage .....	18
2.11.3	Form/NOA Variable Population .....	18

	2.11.4 Form/NOA Generation Conditions.....	18
3	Supporting Documents .....	19
4	Requirements.....	19
	4.1 Project Requirements.....	19

# 1 OVERVIEW

---

The purpose of this change is to Add Threshold languages for Medi-Cal NOA Generation (MC\_239\_V002).

## 1.1 Current Design

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

## 1.2 Requests

1. Add Threshold languages to MC\_DN\_NO\_LINKAGE\_M325 with reason code M325D.  
**Languages Include:** Farsi.
2. Add Threshold languages to Did not Cooperate in Medical Support with reason code M424D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
3. Add Threshold languages to Failed to provide Name/Identity with reason code M423D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
4. Add Threshold languages to Did not apply for Unemployment Insurance Benefits with reason code M418D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
5. Add Threshold languages to Did not apply for Medicare with reason code M422D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
6. Add Threshold languages to Failed to provide Third Party with reason code M421D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
7. Add Threshold languages to Did not apply for Retirement with reason code M416D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
8. Add Threshold languages to Did not apply for State Disability Insurance with reason code M417D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
9. Add Threshold languages to Did not apply for Disability Insurance Benefits with reason code M414D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

10. Add Threshold languages to Did not apply for Veteran benefits with reason code M419D.  
**Languages Include:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.
11. Add Threshold languages to MC\_TN\_PERS\_NOT\_LNKD\_PROG\_M028 with reason code M028T.  
**Languages Include:** Arabic, Farsi, Hmong, Lao.

### 1.3 Overview of Recommendations

1. Add threshold Languages for the NO INDIVIDUAL IN AG W/MC LINK Approved with reason code M325D (Snippet ID - 6621).
2. Add threshold Languages for the Did not Cooperate in Med Supp with a reason code M424D (Snippet ID - 7590).
3. Add threshold Languages for the Denial FTP Name/Identity with a reason code M423D (Snippet ID - 7589).
4. Add threshold languages for the Did not apply for UIB with a reason code M418D (Snippet ID - 7584).
5. Add threshold languages for the Did not apply for Medicare with a reason code M422D (Snippet ID - 7588).
6. Add threshold languages for the FTP Third Party Liability with a reason code M421D (Snippet ID - 7587).
7. Add threshold languages for the Did not apply for Retirement with a reason code M416D (Snippet ID - 7582).
8. Add threshold languages for the Did not apply for SDI with a reason code M417D (Snippet ID - 7583).
9. Add threshold languages for the Did not apply for DIB with a reason code M414D (Snippet ID - 7580).
10. Add threshold languages for the Did not apply for VA - Sign CA5/MC05 with a reason code M419D (Snippet ID - 7585).
11. Add threshold languages for the PERSON IS NOT LINKD TO ANY PRG with a reason code M028T (Snippet ID - 6509).

### 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 Language for the MC\_DN\_NO\_LINKAGE\_M325 Denied with reason code M325D.

#### 2.1.1 Overview

Add threshold language for MC\_DN\_NO\_LINKAGE\_M325 NOA reason Fragments in CalSAWS.

**Reason Fragment Name and ID:** MC\_DN\_NO\_LINKAGE\_M325  
(Fragment ID: 6621)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**Currently Repeatable:** No

**Include NA Back 9:** Yes

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

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

#### 2.1.2 Form/NOA Verbiage

Add MC 239-D NOA fragments in Threshold languages.

**Add Threshold languages:** Farsi.

**NOA Mockups/Examples:** Supporting Documents #1

#### 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 Did not Cooperate in Medical Support with a reason code M424D.

### 2.2.1 Overview

Add threshold languages for MC\_DN\_NON\_COOP\_CHILD\_NON\_COMP\_M424 NOA reason Fragments in CalSAWS.

**Reason Fragment Name and ID:**

MC\_DN\_NON\_COOP\_CHILD\_NON\_COMP\_M424 (Fragment ID: 7590)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**Currently Repeatable:** No

**Include NA Back 9:** Yes

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

**Existing Languages:** English, Spanish

### 2.2.2 Form/NOA Verbiage

Add MC 239-D 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

### 2.2.3 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 Failed to provide Name/Identity with a reason code M423D.

### 2.3.1 Overview

Add threshold languages for MC\_DN\_NAME\_IDENTITY\_NON\_COMP\_M423 NOA reason Fragments in CalSAWS.

**Reason Fragment Name and ID:**

MC\_DN\_NAME\_IDENTITY\_NON\_COMP\_M423 (Fragment ID: 7589)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**Currently Repeatable:** No

**Include NA Back 9:** Yes

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

**Existing Languages:** English, Spanish

### 2.3.2 Form/NOA Verbiage

Add MC 239-D 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

### 2.3.3 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 Did not apply for Unemployment Insurance Benefits with a reason code M418D.

### 2.4.1 Overview

Add threshold languages for MC\_DN\_REFUSED\_UIB\_NON\_COMP\_M418 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:** MC\_DN\_REFUSED\_UIB\_NON\_COMP\_M418  
(Fragment ID: 7584)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**Currently Repeatable:** No

**Include NA Back 9:** Yes

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

**Existing Languages:** English, Spanish

### 2.4.2 Form/NOA Verbiage

Add MC 239-D 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

### 2.4.3 Form/NOA Variable Population

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

### 2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 2.5 Add threshold languages for the Did not apply for Medicare with a reason code M421D.

### 2.5.1 Overview

Add threshold languages for MC\_DN\_DID\_NOT\_APPLY\_MEDICARE\_NON\_COMP\_M422 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:**

MC\_DN\_DID\_NOT\_APPLY\_MEDICARE\_NON\_COMP\_M422 (Fragment ID: 7588)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**Currently Repeatable:** No

**Include NA Back 9:** Yes

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

**Existing Languages:** English, Spanish

### 2.5.2 Form/NOA Verbiage

Add MC 239-D NOA fragments in Threshold languages.

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

**NOA Mockups/Examples:** Supporting Documents #1

### 2.5.3 Form/NOA Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish forms 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 to provide Third Party Liability with a reason code M421D.

### 2.6.1 Overview

Add threshold languages for MC\_DN\_FTP\_THIRD\_PARTY\_LIABILITY\_NON\_COMP\_M421 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:**

MC\_DN\_FTP\_THIRD\_PARTY\_LIABILITY\_NON\_COMP\_M421 (Fragment ID: 7587)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**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 MC 239-D NOA fragments in Threshold languages.

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

**NOA Mockups/Examples:** Supporting Documents #1

### 2.6.3 Form/NOA Variable Population

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

### 2.6.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 2.7 Add threshold languages for the Did not apply for Retirement with a reason code M416D.

### 2.7.1 Overview

Add threshold languages for MC\_DN\_REFUSED\_RETIREMENT\_NON\_COMP\_M416 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:**

MC\_DN\_REFUSED\_RETIREMENT\_NON\_COMP\_M416 (Fragment ID: 7582)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**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 MC 239-D 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

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

### 2.7.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 2.8 Add threshold languages for the Did not apply for State Disability Insurance with a reason code M417D.

### 2.8.1 Overview

Add threshold languages for MC\_DN\_REFUSED\_SDI\_NON\_COMP\_M417 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:** MC\_DN\_REFUSED\_SDI\_NON\_COMP\_M417 (Fragment ID: 7583)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**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 MC 239-DNOA fragments in Threshold languages.

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

**NOA Mockups/Examples:** Supporting Documents #1

### 2.8.3 Form/NOA Variable Population

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

### 2.8.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 2.9 Add threshold languages for the Did not apply for Disability Insurance Benefits with a reason code M414D.

### 2.9.1 Overview

Add threshold languages for MC\_DN\_REFUSED\_DIB\_NON\_COMP\_M414 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:** MC\_DN\_REFUSED\_DIB\_NON\_COMP\_M414 (Fragment ID: 7580)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**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 MC 239-DNOA 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

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

### 2.9.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 2.10 Add threshold languages for the Did not apply for Veteran benefits with a reason code M419D.

### 2.10.1 Overview

Add threshold languages MC\_DN\_REFUSED\_VA\_NON\_COMP\_M419 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:** MC\_DN\_REFUSED\_VA\_NON\_COMP\_M419  
(Fragment ID: 7585)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Denial

**Currently Repeatable:** No

**Include NA Back 9:** Yes

**Current Forms/NOAs Generated with this NOA:**

**Existing Languages:** English, Spanish

### 2.10.2 Form/NOA Verbiage

Add MC 239-D 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

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

### 2.10.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

## 2.11 Add threshold languages for the MC\_TN\_PERS\_NOT\_LNKD\_PROG\_M028 with a reason code M028T.

### 2.11.1 Overview

Add threshold languages for MC\_TN\_PERS\_NOT\_LNKD\_PROG\_M028 NOA reason Fragments in CalSAWS.

**Title Fragment Name and ID:** MC\_TN\_PERS\_NOT\_LNKD\_PROG\_M028  
(Fragment ID: 6509)

**State Form/NOA:** MC 239

**Current NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Current Program(s):** Medi-Cal

**Current Action Type:** Discontinuance

**Currently Repeatable:** No

**Include NA Back 9:** Yes

**Current Forms/NOAs Generated with this NOA:**

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

### 2.11.2 Form/NOA Verbiage

Add MC 239-D NOA fragments in Threshold languages.

**Add Threshold languages:** Arabic, Farsi, Hmong, Lao.

**NOA Mockups/Examples:** Supporting Documents #1

### 2.11.3 Form/NOA Variable Population

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

### 2.11.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	MC 239 NOA Reason fragments	FragmentsVerbiage.xlsx

### 4 REQUIREMENTS

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. RedeDenial, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> </ul>	<p>M325D, M424D, M423D, M418D, M422D, M421D, M416D, M417D, M414D, M419D, M028T Reason Codes are added in threshold languages.</p>

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

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-255762

Task Mgmt: Enhancements to Task Time  
Processing

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
06/12/2023	1.0	Initial Revision	Vallari Bathala

## Table of Contents

1	Overview .....	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions .....	5
2	Recommendations.....	6
2.1	Task Settings .....	6
2.1.1	Overview .....	6
2.1.2	Task Settings Mockup .....	6
2.1.3	Description of Changes .....	7
2.1.4	Page Location .....	7
2.1.5	Security Updates.....	7
2.1.6	Page Mapping.....	7
2.1.7	Page Usage/Data Volume Impacts .....	7
2.2	Task Pop-Up: Task Detail Page .....	7
2.2.1	Overview .....	7
2.2.2	Task Detail Page Mockup .....	8
2.2.3	Description of Changes .....	8
2.2.4	Page Location .....	9
2.2.5	Security Updates.....	9
2.2.6	Page Mapping.....	9
2.2.7	Page Usage/Data Volume Impacts .....	9
2.3	Task Pop-Up: My Tasks Page.....	9
2.3.1	Overview .....	9
2.3.2	Description of Changes .....	9
2.3.3	Page Location .....	10
2.3.4	Security Updates.....	10
2.3.5	Page Mapping.....	10
2.3.6	Page Usage/Data Volume Impacts .....	10
2.4	Task Export: Templates .....	10
2.4.1	Overview .....	10
2.4.2	Export Template Mockup.....	10

2.4.3	Description of Changes .....	10
2.4.4	Page Location .....	10
2.4.5	Security Updates.....	11
2.4.6	Page Mapping.....	11
2.4.7	Page Usage/Data Volume Impacts .....	11
3	Supporting Documents .....	12
4	Requirements.....	13
5	Migration Impacts .....	14
6	Outreach.....	15
7	Appendix.....	16

# 1 OVERVIEW

---

This design outlines modifications to Task Management functionality within the CalSAWS System to enhance the Task Time Record functionality.

## 1.1 Current Design

Task Management functionality within the CalSAWS System provides configuration and functionality that allows recording of actual time spent working a particular Task which was implemented via CA-253348. This enhancement implemented the groundwork and architecture for this functionality.

The CalSAWS System includes a Task Settings page that allows individual counties to enable specific Task Management features.

## 1.2 Requests

1. Introduce additional configurable settings to allow automatic setting of Task Status and/or Task Time Recording based on certain actions.
2. Provide an aggregation of time spend by worker in the Task Time Record panel.
3. Update the Task Export template to include an attribute indicating time spent for a Task.

## 1.3 Overview of Recommendations

1. Update the Task Settings page to include new Sub-Settings for the Task Time Record setting allowing counties to enable/disable the automatic setting of In-Process Task Status and/or a Task Time Record.
2. Update the Task Pop-Up: Task Detail page to provide time metrics aggregated at the Worker level.
3. Update the Task Export template to include an additional attribute to indicate time spent.

## 1.4 Assumptions

1. No impact to analytics/dashboards.

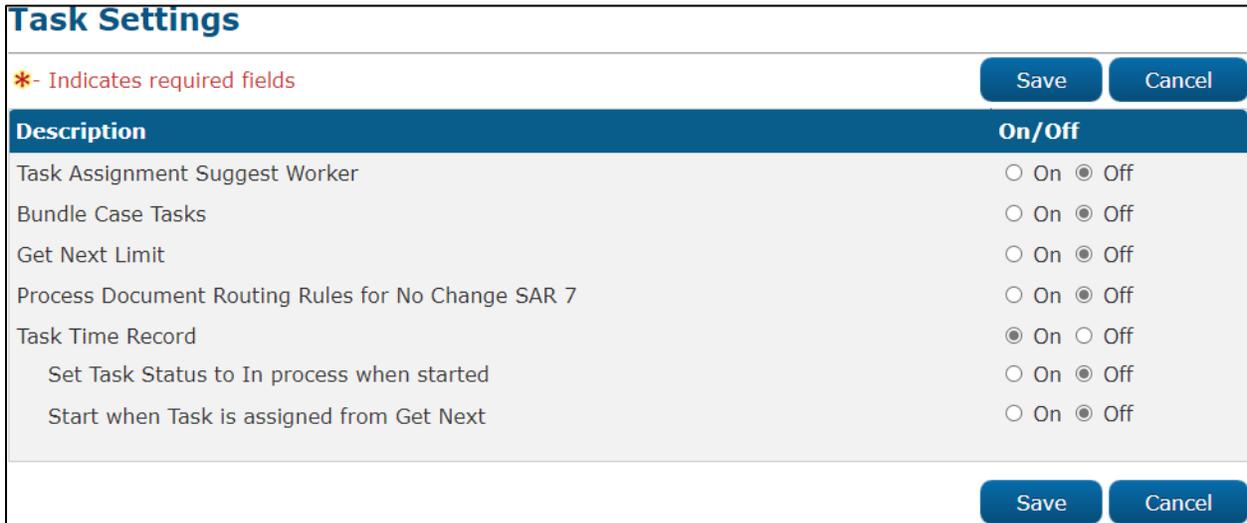
## 2 RECOMMENDATIONS

### 2.1 Task Settings

#### 2.1.1 Overview

This section outlines the modifications to the Task Setting page to include additional sub-settings for the Task Time Record option.

#### 2.1.2 Task Settings Mockup

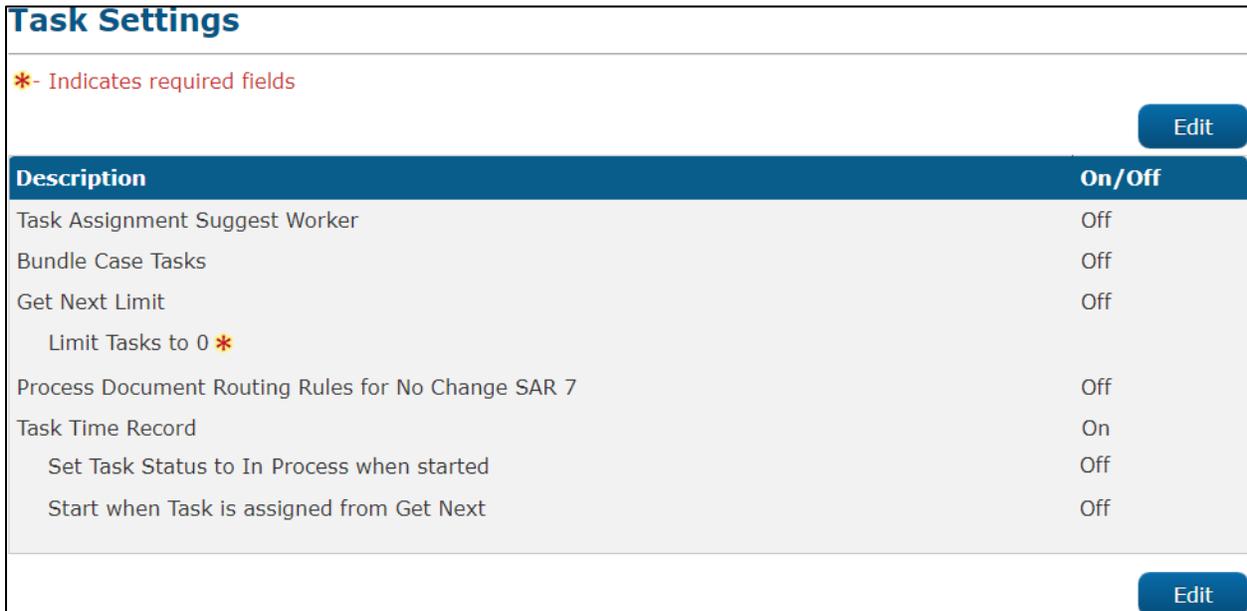


The mockup shows a 'Task Settings' form in edit mode. At the top left, there is a legend: '\*- Indicates required fields'. On the right, there are 'Save' and 'Cancel' buttons. Below the legend is a table with two columns: 'Description' and 'On/Off'. The table contains the following rows:

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input type="radio"/> On <input checked="" type="radio"/> Off
Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Document Routing Rules for No Change SAR 7	<input type="radio"/> On <input checked="" type="radio"/> Off
Task Time Record	<input checked="" type="radio"/> On <input type="radio"/> Off
Set Task Status to In process when started	<input type="radio"/> On <input checked="" type="radio"/> Off
Start when Task is assigned from Get Next	<input type="radio"/> On <input checked="" type="radio"/> Off

At the bottom right, there are 'Save' and 'Cancel' buttons.

Figure 2.1.2-1 – Task Settings – Edit Mode



The mockup shows a 'Task Settings' form in view mode. At the top left, there is a legend: '\*- Indicates required fields'. On the right, there is an 'Edit' button. Below the legend is a table with two columns: 'Description' and 'On/Off'. The table contains the following rows:

Description	On/Off
Task Assignment Suggest Worker	Off
Bundle Case Tasks	Off
Get Next Limit	Off
Limit Tasks to 0 *	
Process Document Routing Rules for No Change SAR 7	Off
Task Time Record	On
Set Task Status to In Process when started	Off
Start when Task is assigned from Get Next	Off

At the bottom right, there is an 'Edit' button.

Figure 2.1.2-2 – Task Settings – View Mode

### 2.1.3 Description of Changes

1. Update the Task Settings page to include two sub-settings under the "Task Time Record" setting that will display when the parent "Task Time Record" setting is set to "On":
  - a. "Set Task Status to In Process when started"
  - b. "Start when Task is assigned from Get Next"

The settings will display "On" and "Off" radio-button options and default to "Off" for all counties.

These settings will control the status of the Task and start the Task time recording on the Task Pop-Up: Task Detail page as defined in [Section 2.2.3 Description of Changes](#).

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

### 2.1.7 Page Usage/Data Volume Impacts

N/A

## 2.2 Task Pop-Up: Task Detail Page

### 2.2.1 Overview

This section outlines the modifications to the Task Pop-Up: Task Detail page to include aggregated Task Time Record information by worker.

## 2.2.2 Task Detail Page Mockup

### Task Detail

Result 1 of 1 - 1

\*- Indicates required fields

Start Task
Save and Return
Save
Cancel

<b>Case Number:</b> <input type="text"/>	<b>Case Name:</b> Case Name	<b>Program(s): *</b> Child Protective Services - <input type="text"/>	<b>Status: *</b> Assigned <input type="text"/>
<b>Category: *</b> Case Update <input type="text"/>	<b>Type: *</b> Change in Primary Language Designation <input type="text"/>	<b>Sub-Type:</b> <input type="text"/>	<b>Priority:</b> Critical
<b>Due Date: *</b> 06/30/2023 <input type="text"/>	<b>Date Created:</b> 06/14/2023	<b>Worker Assigned Date:</b> 06/14/2023	<b>Expedited:</b> Yes <input type="text"/>
<b>Assign to Program Worker:</b> No <input type="text"/>	<b>Worker ID:</b> <input type="text"/> <span>Select</span>	<b>Bank ID:</b> <input type="text"/> <span>Select</span>	<b>Automated Action:</b> No

**Long Description:**

▶ Instructions

▶ Task History

▼ Task Time Record

**Total Duration: 00:40:00**

Worker Name	Worker ID	Start Time	Stop Time	Stop Type	Total Time
Vallari Bathala	<input type="text"/>	06/14/2023 06:50:00 PM	06/14/2023 06:55:00 PM	Manual Stop	00:05:00
Vallari Bathala	<input type="text"/>	06/14/2023 06:00:00 PM	06/14/2023 06:15:00 PM	Manual Stop	00:15:00
Lisa Simpson	<input type="text"/>	06/14/2023 05:15:00 PM	06/14/2023 05:35:00 PM	Manual Stop	00:20:00

Worker Name	Worker ID	Total Time
Lisa Simpson	<input type="text"/>	00:20:00
Vallari Bathala	<input type="text"/>	00:20:00

Save and Return
Save
Cancel

Figure 2.2.2-1 – Task Detail Page

## 2.2.3 Description of Changes

1. Update the Task Pop-Up: Task Detail page Task Time Record collapsible panel to display a new sub-panel to aggregate time spent information in the detailed Task Time Record panel by worker. This panel will be collapsed on page load and will display whether the "Task Time Record" Task Setting has been enabled for the county or not.

The following field and columns will display in this new sub-panel:

- a. Worker Name – This column will display the staff first and last name.
  - b. Worker ID – This column will display the Worker ID value.
  - c. Total Time – This column will display an aggregate sum of detailed Task Time Record entries with a start and stop time for the Worker.
2. Update the “Start Task” button to automatically set the Task to In-Process Status if the “Set Task Status to In Process when started” setting on the Task Settings page is turned on for the county.

#### 2.2.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option

#### 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 Task Pop-Up: My Tasks Page

#### 2.3.1 Overview

This section outlines the modifications to the Task Pop-Up: My Tasks page to process a new Task Time Record sub-setting.

#### 2.3.2 Description of Changes

1. Update the “Get Next” button to automatically start a Task Time Record for the Task when a worker clicks “Get Next” and the “Start when Task is assigned from Get Next” setting on the Task Settings Page is set to “On” for the county.

### 2.3.3 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option

### 2.3.4 Security Updates

N/A

### 2.3.5 Page Mapping

N/A

### 2.3.6 Page Usage/Data Volume Impacts

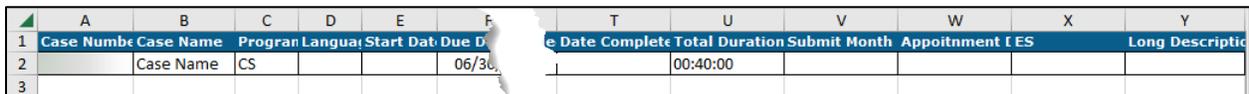
N/A

## 2.4 Task Export: Templates

### 2.4.1 Overview

This section outlines the modifications to the Export Template in the Task Pop-Up: My Tasks and Task Search pages to include new Total Duration column.

### 2.4.2 Export Template Mockup



	A	B	C	D	E	F	T	U	V	W	X	Y
1	Case Number	Case Name	Program Language	Start Date	Due Date	Complete Date	Total Duration	Submit Month	Appointment	ES	Long Description	
2		Case Name	CS			06/30	00:40:00					
3												

Figure 2.4.2.1 – Export Template

### 2.4.3 Description of Changes

1. Total Duration – This column will display the value of the “Total Duration” attribute displayed in the Task Time Record panel of the Task Pop-Up: Task Detail page. If a Task does not have any time logged, this value will be blank.

### 2.4.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option

#### **2.4.5 Security Updates**

N/A

#### **2.4.6 Page Mapping**

N/A

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

N/A

### 3 SUPPORTING DOCUMENTS

---

N/A

## 4 REQUIREMENTS

---

N/A

## 5 MIGRATION IMPACTS

---

N/A

## 6 OUTREACH

---

N/A

## 7 APPENDIX

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-256939

End LA County automated GR RE Due Date  
advance and AA Packet completion

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Maria Jensen
	Reviewed By	Tiffany Huckaby

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/10/2023	0.1	Initial Draft	Maria Jensen
05/03/2023	0.2	Added Assumption for process end date; Added Supporting Documents	Maria Jensen
06/26/2023	0.3	County comments: moved all dates 1 month later	Maria Jensen

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Updates to Document Enclosure Detail page .....	5
	2.1.1 Overview .....	5
	2.1.2 Description of Changes .....	5
3	Supporting Documents .....	5
4	Requirements.....	6
	4.1 Project Requirements.....	6

# 1 OVERVIEW

---

## 1.1 Current Design

For LA county a DCR is run through Batch every month to update the GA/GR Annual Agreement packet's Customer Reporting status to 'Complete - EDBC Accepted' and advance the GA/GR RE period by 1 year. See SCR CA-232358.

## 1.2 Requests

End the automated process that progresses the GA/GR AA packet status and advances the RE Due Date.

## 1.3 Overview of Recommendations

End the automated process that progresses the GA/GR AA packet status and advances the RE Due Date.

## 1.4 Assumptions

1. CA-251447 will replace ABP 898-16 'General Relief Annual Agreement' packet with GR RE ('General Relief Annual Renewal').
2. The final month of this automated process will be 07/2023 inclusive. See Supporting Documents #1 for a list of cases with GA RE Due Date of August 2023.

## 2 RECOMMENDATIONS

---

### 2.1 Updates to Document Enclosure Detail page

#### 2.1.1 Overview

GR AA packets are mailed out to customers every month. Due to COVID-19, a new batch script (SCR CA-220229) was created in CalSAWS for the GR AA packets to mark complete (if not complete) and advance GR AA Due date to 12 months before the GA/GR 10-day cut-off Disc sweep jobs run.

This effort will undo CA-220229 and turn off the batch job introduced in CA-220229.

#### 2.1.2 Description of Changes

End the automated process that progresses the GA/GR AA packet status and advances the RE Due Date.

**Technical Note:** Deactivate Batch Job 'PB19C669'; leave the 2 called procedures intact.

## 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Forms	Cases with GA RE Due Date in August 2023	Cases with GA RE Due Date in August 2023.xlsx

## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	<p>The CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with CalSAWS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	<p>With SCR CA-256939, the Customer Reporting status of the GA/GR Annual Agreement packet will no longer be automatically progressed, in the CalSAWS system.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-256940

Add MC 007 in Threshold Languages

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

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
06/28/2023	1.0	Initial Draft	Mamata Sasumana

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add threshold languages for MC 007(07/22) form. ....	5
	2.1.1 Overview .....	5
	2.1.2 Form Verbiage .....	5
	2.1.3 Form/NOA Variable Population .....	5
	2.1.4 Form/NOA Generation Conditions.....	6
	2.2 Update Non-MAGI RE Packet (Non-LA) .....	6
	2.2.1 Overview .....	6
	2.2.2 Form/NOA Verbiage .....	6
	2.2.3 Form/NOA Variable Population .....	6
	2.2.4 Form/NOA Generation Conditions.....	6
	2.3 Update Mixed HH RE Packet (Non-LA) .....	7
	2.3.1 Overview .....	7
	2.3.2 Form/NOA Verbiage .....	7
	2.3.3 Form/NOA Variable Population .....	7
	2.3.4 Form/NOA Generation Conditions.....	7
3	Supporting Documents .....	8
4	Requirements.....	9
	4.1 Project Requirements.....	9

# 1 OVERVIEW

The purpose of this change is to add available Threshold Languages to form MC 007 (07/22).

## 1.1 Current Design

Currently the MC 007 (07/22) is available in English and Spanish languages in CalSAWS.

## 1.2 Requests

1. Add MC 007(07/22) in available threshold languages to CalSAWS.
2. Update Non-MAGI RE Packet, Mixed HH RE Packet with MC 007 in available threshold languages.

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

## 1.3 Overview of Recommendations

1. Add MC 007(07/22) in available threshold languages to CalSAWS.
2. Update Non-MAGI RE Packet, Mixed HH RE Packet in available threshold languages to MC 007.

## 1.4 Assumptions

1. MC 007 form's header consists of the DHCS standard header (Header\_3-4). This effort will not change the form's header.
2. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

### 2.1 Add threshold languages for MC 007(07/22) form.

#### 2.1.1 Overview

Add the available Threshold languages to MC 007(07/22).

**State Form:** MC 007 (07/22)

**Programs:** Medi-Cal

**Attached Forms:** N/A

**Template Description:** This form is sent to Medi-Cal applicants to outline the eligibility limitations of the program, specifically those regarding real and personal property, and countable income.

**Forms Category:** Forms

**Template Repository Visibility:** All Counties

**Existing Languages:** English, Spanish

#### 2.1.2 Form Verbiage

##### **Add MC 007 (07/22) XDP in threshold languages.**

Add MC 007 XDP with version (07/22) in threshold languages.

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

**Form Header** DHCS standard header (Header\_3-4)

**Form Title (Document List Page Displayed Name):** Medi-Cal General Property Limitations

**Form Number:** MC 007

**Include NA Back 9:** No

**Imaging Form Name:** MC General Property Limitations

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

#### 2.1.3 Form/NOA Variable Population

This form has no variables.

### 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 a 'Print Only', Static PDF document.

## 2.2 Update Non-MAGI RE Packet (Non-LA)

### 2.2.1 Overview

This SCR will update the Non-MAGI RE Packet (non-LA) in CalSAWS to account for the updates to forms MC 007.

**State Form:** Non-MAGI RE Packet

**Current Programs:** Medi-Cal

**Current Attached Forms:** Coversheet, MC 210 RV, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077A, PUB 13, PUB 183, MC 003, NVRA VPF

**Current Forms Category:** Application

**Current Template Repository Visibility:** Migration Counties

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

### 2.2.2 Form/NOA Verbiage

#### Update Form XDP

This SCR will update the threshold languages of the packet with respective threshold languages of MC 007(07/22).

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

**Form Header:** CalSAWS Standard Header (RD\_MIG\_Header)

**Form Number:** Non-MAGI RE Packet

### 2.2.3 Form/NOA Variable Population

There will be no updates to the packet's variables.

### 2.2.4 Form/NOA Generation Conditions

#### Updates to Form Generation

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

## 2.3 Update Mixed HH RE Packet (Non-LA)

### 2.3.1 Overview

This SCR will update the Mixed HH RE Packet (non-LA) in CalSAWS to account for the updates to forms MC 007.

**State Form:** Mixed Household RE Packet

**Current Programs:** Medi-Cal

**Current Attached Forms:** Coversheet, MC 217, MC 019, MC 219, MC 372, MC 007, DHCS 7077, DHCS 7077-A, PUB 13, PUB 183, MC 003, NVRA VPF

**Current Forms Category:** Application

**Current Template Repository Visibility:** Migration Counties

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

### 2.3.2 Form/NOA Verbiage

#### Update Form XDP

This SCR will update the threshold languages of the packet with respective threshold languages of MC 007(07/22).

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

**Form Header:** CalSAWS Standard Header (RD\_MIG\_Header)

**Form Number:** Mixed Household RE Packet

### 2.3.3 Form/NOA Variable Population

There will be no updates to the packet's variables.

### 2.3.4 Form/NOA Generation Conditions

#### Updates to Form Generation

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

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Form	MC 007 (07/22)	MC007_ ARA ADA Compliant.pdf MC007_ ARM ADA Compliant.pdf MC007_ CAM ADA Compliant.pdf MC007_ CHI ADA Compliant.pdf MC007_ FAR ADA Compliant.pdf MC007_ HMO ADA Compliant.pdf MC007_ KOR ADA Compliant.pdf MC007_ LAO ADA Compliant.pdf MC007_ RUS ADA Compliant.pdf MC007_ TAG ADA Compliant.pdf MC007_ VIE ADA Compliant.pdf

## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> <li>n. COLA notices;</li> <li>o. Time limit notices;</li> <li>p. Transitioning of aid notices;</li> <li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li> <li>r. Non-compliance and sanction notices;</li> <li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li> <li>t. Corrective NOAs on State Fair Hearing decisions;</li> <li>u. CSC paper ID cards with LRS-generated access information; and</li> <li>v. CSC PIN notices.</li> </ul>	<p>MC 007 (07/22) is added in available threshold languages to latest version (07/22). The Non-MAGI RE Packet, Mixed HH RE Packet will also be updated in threshold languages with account to MC 007(07/22).</p>



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-260061

Opt-In and Update Text Messaging Status in  
CalSAWS after Wave 4

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Andrea Rodriguez
	Reviewed By	Michael Wu, Naga Chinduluru, Himanshu Jain, Chitra Barsagade

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
4/14/2023	1.0	Initial	Andrea Rodriguez
6/26/2023	1.1	Added additional recommendations	Andrea Rodriguez, Tisha Mutreja

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Opt-In for Text Messaging Data Change .....	5
	2.1.1 Overview .....	5
	2.1.2 Description of Change.....	5
	2.1.3 Estimated Number of Records Impacted/Performance.....	6
	2.2 CalHEERS Update Transaction .....	7
	2.2.1 Overview .....	7
	2.2.2 Description of Change.....	7
	2.2.3 Execution Frequency.....	7
	2.2.4 Key Scheduling Dependencies.....	7
	2.2.5 Counties Impacted .....	7
	2.2.6 Data Volume/Performance.....	7
	2.2.7 Failure Procedure/Operational Instructions.....	7
3	Requirements.....	8
	3.1 Project Requirements.....	8

# 1 OVERVIEW

---

Due to new FCC regulations, state governmental agencies may send texts to reach customers, despite a lack of prior express consent. The customers can revoke consent at any time. This SCR will apply a data change to automatically enroll certain customers into receiving text messages.

## 1.1 Current Design

Text messages are sent to primary applicants who are opted-in to text messaging and have a text messaging status of 'Verified.'

## 1.2 Requests

Due to the new FCC regulation, 'Opt-In' is not required to send text messages. Do not send Information Update transactions to CalHEERS for individuals with phone numbers updated from this process.

## 1.3 Overview of Recommendations

1. Apply data change to opt-in and update text message status for certain existing Medi-Cal customers in CalSAWS after Wave 4.
2. CalHEERSUpdateTransaction (PB00CH200) and CalHEERSUpdateTransactionTables (PB00CH201) will be turned off on the night of the implementation of SCR with BSCR # CA-263808.
3. CalHEERSUpdateTransaction (PB00CH200) and CalHEERSUpdateTransactionTables (PB00CH201) will be turned back on the following night the implementation of SCR with BSCR # CA-263810 to resume normal processing. Update the last success date to a day prior i.e., to process the records from 07/31 8 PM PST, so it excludes the text opt-in updates.

## 1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. Batch Job PB00C113 will run prior to any batch text messaging campaign to automatically Opt-out any person that is associated to a Domestic Violence confidentiality and/or case flag (Los Angeles County only), and the person's household status for the case is 'In the Home'.
3. Real-time text messages will not send to any person linked to any case with an active 'Domestic Violence' case flag (Los Angeles County only) and/or an existing 'Domestic Violence' confidentiality record and the person's household status for the case is 'In the Home'. The 'Opt-in' value itself will not automatically update to 'Opt-out' until the nightly batch job is run.
4. Undeliverable text messages are immediately re-sent and when the text message fails after 3 attempts, the Text Message Status will change to 'Undeliverable'.

5. Domestic Violence Confidentiality functionality is available in all counties. Only Los Angeles County has pre-existing Domestic Violence Case Flag functionality available.
6. The CalHEERS Information Updates job will be turned off during the time that the data change is processing. No information updates transactions will be sent during this time.

## 2 RECOMMENDATIONS

---

### 2.1 Opt-In for Text Messaging Data Change

#### 2.1.1 Overview

This data change will automatically opt-in certain existing primary applicants of active and pending Medi-Cal programs (who have not already manually opted-out) into text messaging communications.

#### 2.1.2 Description of Change

1. Update the Opt-In indicator to 'Yes' and Status to 'Verified' for Cell, Main, and Home phones belonging to primary applicants of active and pending Medi-Cal programs as of the system date.
  - a. The following records will be updated:
    - i. Opt-In indicator is Blank
    - ii. Opt-In indicator is 'No' and Status in 'No Response,' 'Pending Verification,' 'Blank,' or 'Verified.'
  - b. Cell phone numbers will be Opted-in first, followed by Main phone numbers, and lastly, Home phone numbers.
  - c. The following exclusions will apply:
    - i. Exclude phone numbers which are not properly formatted phone numbers.
      1. Phone numbers should be 10 digits long and cannot begin with 0.
      2. Extension numbers can be up to 10 digits long (if applicable).
    - ii. Exclude phone numbers which do not belong to primary applicants of active and pending Medi-Cal programs as of the system date.
    - iii. Exclude phone numbers belonging to persons who already have a phone number opted-in (of any type).
    - iv. Exclude phone number record when it is linked to any case with an active 'Domestic Violence' case flag (Los Angeles County only) or an existing 'Domestic Violence' confidentiality record, and their household status for the case is 'In the Home'.

- v. Exclude phone number when there exists another record that has the same phone number and the Opt-In indicator is 'No' and the Status is 'Opted-Out'.
- vi. Exclude phone number when there exists another record that has the same phone number Opted-In already.
- d. When the same person has multiple phone numbers of the same type, only opt-in the earliest created phone number record (or the phone number record with minimum record ID in the case when the created time is the same) and exclude the rest.

Example 1: Primary person has only the following phone numbers (assume no other person has the same phone numbers), and the Opt-In is blank for both.

- i. Main: 222-222-2222 (Created 01/01/2021 8:00AM)
- ii. Cell: 222-222-2222 (Created 01/01/2021 8:05AM)
- iii. Cell: 333-333-3333 (Created 01/01/2021 8:10AM)

Only the Cell: 222-222-2222 will be Opted-in first, per the above requirements b. and d.

- e. When there are duplicate phone numbers of any type (cell, main, or home), only opt-in the earliest created phone number record (or the phone number record with the minimum record ID in the case when the created time is the same) and exclude the rest.

Example 1: Primary person has two records, and the Opt-In is blank for both.

- i. Cell: 444-444-4444 (created 01/01/2021 8:00AM)
- ii. Cell: 444-444-4444 (created 01/01/2021 8:05AM)

Only the record created on 01/01/2021 8:00AM will be opted-in.

Example 2: Mother (Primary on Case A) has 555-555-5555 Cell (created 01/01/2021 8:00AM) and Daughter (Primary on Case B) also has 555-555-5555 Cell (created 01/01/2021 8:05AM).

Only the Mother's phone number will be opted-in.

2. Update the Transaction History record for all contact records updated by the data change to indicate that the record was opted-in to text messaging.
3. Create a Journal entry for the person updated by the data change.
  - a. The Journal entry will follow the same template used when the text messaging Opt-In indicator is updated to Yes on the Contact Detail.

### 2.1.3 Estimated Number of Records Impacted/Performance

1,000,000

## 2.2 CalHEERS Update Transaction

### 2.2.1 Overview

The CalHEERS Information Updates job will be turned off during the time that the data change is processing. No information updates transactions will be sent during this time. The job will be turned back on after the data change has completed.

### 2.2.2 Description of Change

1. CalHEERSUpdateTransaction (PB00CH200) and CalHEERSUpdateTransactionTables (PB00CH201) will be turned off on the night of the implementation of SCR with BSCR # CA-263808.
2. CalHEERSUpdateTransaction (PB00CH200) and CalHEERSUpdateTransactionTables (PB00CH201) will be turned back on the following night the implementation of SCR with BSCR # CA-263810 to resume normal processing. Update the last success date to a day prior i.e., to process the records from 07/31 8 PM PST, so it excludes the text opt-in updates.

### 2.2.3 Execution Frequency

Once during the data change process.

### 2.2.4 Key Scheduling Dependencies

N/A

### 2.2.5 Counties Impacted

All counties.

### 2.2.6 Data Volume/Performance

N/A

### 2.2.7 Failure Procedure/Operational Instructions

CalHEERS staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e. rerunning the job, delaying the run, contacting appropriate parties for server issues, etc.)

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	<p>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:</p> <ul style="list-style-type: none"><li>a. E-Mail;</li><li>b. Text messaging;</li><li>d. Automated phone reminder;</li><li>e. USPS mail</li></ul>	<p>This SCR will update the process by which a participant opts-in to receive text messages.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-260247

Add MC RE Packets in Mien and Ukrainian  
languages

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Meghana Chander
	Reviewed By	Madhan Kumar

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/26/2023	1.0	Initial document	Meghana Chander

## Table of Contents

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

# 1 OVERVIEW

---

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

## 1.1 Current Design

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

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

## 1.4 Assumptions

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

## 2 RECOMMENDATIONS

---

### 2.1 Add MAGI RE packet in Mien and Ukrainian Languages

#### 2.1.1 Overview

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

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

**Newly Added Languages:** Mien and Ukrainian

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

#### 2.1.2 Create Threshold Form XDPs

1. Add MAGI RE Packet in Mien and Ukrainian languages for Los Angeles and Migration counties.

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

**Newly Added Languages:** Mien and Ukrainian

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

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

## 2.2 Add Non-MAGI RE packet in Mien and Ukrainian Languages

### 2.2.1 Overview

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

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

**Newly Added Languages:** Mien and Ukrainian

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

### 2.2.2 Create Threshold Form XDPs

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

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

**Newly Added Languages:** Mien and Ukrainian

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

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

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

## 2.3 Add Mixed Household RE packet in Mien and Ukrainian Languages

### 2.3.1 Overview

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

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

**Newly Added Languages:** Mien and Ukrainian

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

### 2.3.2 Create Threshold Form XDPs

1. Add Mixed Household RE Packet in Mien and Ukrainian languages for Los Angeles and Migration counties.

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

**Newly Added Languages:** Mien and Ukrainian

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

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

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

### 3 SUPPORTING DOCUMENTS

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

### 4 REQUIREMENTS

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 (CAR-1239)	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> <li>a. Appointment notices;</li> <li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li> <li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li> <li>d. Periodic reporting notices;</li> <li>e. Contact letters;</li> <li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li> <li>g. Information notices and stuffers;</li> <li>h. Case-specific verification/referral forms;</li> <li>i. GR Vendor notices;</li> <li>k. Court-mandated notices, including Balderas notices;</li> <li>l. SSIAP appointment notices;</li> <li>m. Withdrawal forms;</li> </ul>	MC RE Packet will be added in Mien and Ukrainian languages to CalSAWS.

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

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-261531

Task Mgmt: Enhance Clearance Tasks to  
Indicate Additional Information

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena, Gillian Bendicino

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
05/15/2023	1.0	Initial Revision	Vallari Bathala

# Table of Contents

1	Overview .....	6
	1.1 Current Design.....	6
	1.2 Requests.....	6
	1.3 Overview of Recommendations.....	7
	1.4 Assumptions .....	7
2	Recommendations.....	8
	2.1 Task Pop-Up: Task Detail Page .....	8
	2.1.1 Overview .....	8
	2.1.2 Task Detail Page Mockup .....	8
	2.1.3 Description of Changes .....	8
	2.1.4 Page Location .....	9
	2.1.5 Security Updates.....	9
	2.1.6 Page Mapping.....	9
	2.1.7 Page Usage/Data Volume Impacts .....	9
	2.2 Task Pop-Up: Task Search Page .....	9
	2.2.1 Overview .....	9
	2.2.2 Task Search Page Mockup .....	10
	2.2.3 Description of Changes .....	10
	2.2.4 Page Location .....	11
	2.2.5 Security Updates.....	11
	2.2.6 Page Mapping.....	11
	2.2.7 Page Usage/Data Volume Impacts .....	11
	2.3 Task Pop-up: My Tasks Page.....	11
	2.3.1 Overview .....	11
	2.3.2 Task Search Page Mockup .....	12
	2.3.3 Description of Changes .....	12
	2.3.4 Page Location .....	12
	2.3.5 Security Updates.....	12
	2.3.6 Page Mapping.....	12
	2.3.7 Page Usage/Data Volume Impacts .....	12
	2.4 Task Search Export: Template .....	13
	2.4.1 Overview .....	13
	2.4.2 Task Search Export Mockup.....	13

2.4.3	Description of Changes .....	13
2.4.4	Page Validations .....	13
2.4.5	Page Location .....	13
2.4.6	Security Updates.....	13
2.4.7	Page Mapping.....	13
2.4.8	Page Usage/Data Volume Impacts .....	14
2.5	Clearance Processing.....	14
2.5.1	Overview .....	14
2.5.2	Description of Changes .....	14
2.5.3	Page Validation.....	14
2.5.4	Security Updates.....	14
2.5.5	Page Mapping.....	14
2.5.6	Page Usage/Data Volume Impacts .....	15
2.6	Application Transfer API.....	15
2.6.1	Overview .....	15
2.6.2	Description of Change .....	15
2.6.3	Partner Integration Testing .....	15
2.6.4	Execution Frequency.....	15
2.6.5	Key Scheduling Dependencies .....	15
2.6.6	Counties Impacted .....	15
2.6.7	Category .....	16
2.6.8	Data Volume/Performance.....	16
2.6.9	Interface Partner.....	16
2.6.10	Failure Procedure/Operational Instructions.....	16
2.7	Intake Automated Action Processing .....	16
2.7.1	Overview .....	16
2.7.2	Description of Changes .....	16
2.7.3	Page Validation.....	16
2.7.4	Security Updates.....	16
2.7.5	Page Mapping.....	17
2.7.6	Page Usage/Data Volume Impacts .....	17
2.8	Clearance Task Guided Navigation.....	17
2.8.1	Overview .....	17
2.8.2	Description of Changes .....	17
2.8.3	Page Location .....	17

2.8.4	Security Updates.....	17
2.8.5	Page Mapping.....	17
2.8.6	Page Usage/Data Volume Impacts .....	17
2.9	Task Settings Page.....	18
2.9.1	Overview .....	18
2.9.2	Task Settings .....	18
2.9.3	Description of Changes .....	18
2.9.4	Page Location .....	19
2.9.5	Security Updates.....	19
2.9.6	Page Mapping.....	19
2.9.7	Page Usage/Data Volume Impacts .....	19
3	Supporting Documents .....	20
4	Requirements.....	21
5	Migration Impacts .....	22
6	Outreach .....	23
7	Appendix.....	24
7.1	Application Registration Summary page ES Questions.....	24
7.2	Application Registration Summary page IN Questions .....	24

# 1 OVERVIEW

---

This design outlines modifications to Task Management functionality within the CalSAWS System to provide additional functionality for automated Clearance Tasks.

## 1.1 Current Design

The Clearance Automated Action is invoked when an Application Registration Summary page is completed and indicated as signed. The resulting Task is associated to a "Clearance" Task Type with a Long Description of "Clearance" and a Reference Number attribute to assist with searching for the appropriate Application Registration page entry. The Language attribute for these Tasks is blank and the Task does not indicate additional information such as which programs are being applied for or if there is potential for Expedited Service or Immediate Need.

The Clearance BenefitsCal Task is created when an e-Application is submitted from BenefitsCal and the county has configured an appropriate Task Bank that is associated to the same Office as the e-Application and the Task Bank can receive such Tasks. These Tasks do not indicate additional information such as which programs are being applied for or if there is potential Expedited Service and/or Immediate Need.

Currently the guided navigation routing for the Clearance, Clearance, Clearance CMIPSII and Clearance ICT Clearance Tasks to route to the Search pages.

## 1.2 Requests

1. Update the Clearance and Clearance BenefitsCal Tasks to consistently be associated to a language and to provide additional information such as which programs are being applied for and potential Expedited Service and/or Immediate Need.
2. Update the guided navigation routing for the Clearance, Clearance, Clearance CMIPSII and Clearance ICT Clearance Tasks to route to the Detail pages.

### 1.3 Overview of Recommendations

1. Enhance the Expedited field in the Task Pop-Up: Task Detail page to have more specific values than simply Yes and No.
2. Modify logic for Clearance and Clearance BenefitsCal Tasks to indicate which programs are being applied for and to set an Expedited type when appropriate.
3. Update the Expedited search field on the Task Pop-Up: Task Search page to include the new Expedited types.
4. Update the Expedited icon on the Task Pop-Up: Task Search/My Tasks pages to display the Expedited value on mouseover.
5. Update the Task Pop-Up export template Expedited column to display the new Expedited types when appropriate.
6. Update Guided Navigation processing for clearance Tasks to route directly to the appropriate detail page.
7. Create a Task Setting allowing counties to enable Get Next processing to give prioritization to ES/IN Expedited Tasks.

### 1.4 Assumptions

1. At the time of implementation, existing Tasks with an Expedited value of Yes, will display Expedited Type of "Other". Existing Tasks with an Expedited value of No will have a blank Expedited Type.

## 2 RECOMMENDATIONS

### 2.1 Task Pop-Up: Task Detail Page

#### 2.1.1 Overview

This section outlines the modifications to the Task Pop-Up: Task Detail page to update the Expedited drop down to include more specific options than just Yes/No.

#### 2.1.2 Task Detail Page Mockup

The screenshot shows a 'Task Detail' form with the following fields and options:

- Case Number:** (empty)
- Case Name:** (empty)
- Program(s): \*** (empty)
- Status: \*** Assigned (dropdown)
- Reference Number:** (empty)
- Category: \*** Application Registration (dropdown)
- Type: \*** Clearance (dropdown)
- Sub-Type:** (empty)
- Priority:** Critical (dropdown)
- Expedited:** IN (dropdown menu open showing options: ES, IN, ES/IN, Other)
- Due Date: \*** 05/24/2023 (calendar icon)
- Date Created:** 05/23/2023
- Worker Assigned Date:** 05/23/2023
- Assign to Program Worker:** No (dropdown)
- Worker ID:** (empty) with Select and Suggest buttons
- Bank ID:** (empty) with Select button
- Automated:** Yes (checkbox)
- Long Description:** Clearance: CalWORKs, Medi-Cal

Below the form are three expandable sections: Instructions, Task History, and Task Time Record.

Figure 2.1.1 – Task Detail Page Mockup Name

#### 2.1.3 Description of Changes

1. Expedited – Modify the dropdown menu to include the following options in the listed order instead of Yes and No:
  - a. BLANK
  - b. ES
  - c. IN
  - d. ES/IN
  - e. Other

Existing Tasks with an Expedited value of "Yes" will reflect an Expedited value of "Other" at the time of implementation.

Existing Tasks with an Expedited value of "No" will reflect a blank Expedited value at the time of implementation.

2. Begin tracking historical changes to the Expedited field in the Task History panel.

#### 2.1.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

Update page mapping for the Expedited dropdown to include the new options available.

#### 2.1.7 Page Usage/Data Volume Impacts

N/A

### 2.2 Task Pop-Up: Task Search Page

#### 2.2.1 Overview

This section outlines the modifications to the Task Pop-Up: Task Search page to update the Expedited drop down to include more specific options than just Yes/No.

## 2.2.2 Task Search Page Mockup

**Task Search**
Help

\* - Indicates required fields

Refine Your Search Search

**Display Mode:**  
Standard

**Case Number:**  Select

**Program:**

**Worker ID:**  Select

**Bank ID:**  Select

**Office Name:**  Select

**Unit ID:**  00

**Status:** Assigned

**Category:**

**Type:**

**Sub-Type:**

**Priority:**

**Newly Assigned:**

**Expedited:**

ES  
IN  
ES/IN  
Other

**Due Date From:**

**To:**

[Advanced Search](#)

Results per Page: 100 Search

Search Results Summary Results 1 - 1 of 1

Add Task

Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	Date Appended
05/02/2023	<input type="checkbox"/>	<span>Expedited</span> ES/IN	Case Name	CW	Manual	<a href="#">Final Fraud Findings</a>	Assigned	<input type="text"/>	<input type="text"/>

**Action:** \*  Assign to Me Add Task

**Remove Bank Assignment:**  No Submit

Figure 2.2.2 – Task Search Page Mockup Name

## 2.2.3 Description of Changes

1. Expedited - Modify the dropdown menu to include the following options in the listed order instead of Yes and No:
  - a. BLANK
  - b. ES
  - c. IN
  - d. ES/IN
  - e. Other

This enhancement will allow Tasks to be searched by specific Expedited types.

2. Expedited Indicator Icon – Modify the icon to display a tooltip on mouseover to display the type of Expedited. (Reference Figure 2.2.2 for display/placement)

#### 2.2.4 Page Location

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

#### 2.2.5 Security Updates

N/A

#### 2.2.6 Page Mapping

Update page mapping for the Expedited dropdown to include the new options available.

#### 2.2.7 Page Usage/Data Volume Impacts

N/A

### 2.3 Task Pop-up: My Tasks Page

#### 2.3.1 Overview

This section outlines the modifications to the Task Pop-Up: My Tasks page to indicate the specific Expedited type on mouseover.

## 2.3.2 Task Search Page Mockup

	Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Date Assigned	Date Appended	Program Worker
<input type="checkbox"/>	06/30/2023	[redacted]	Case Name	CS	Case Update	<a href="#">Change in Primary Language Designation</a>	Assigned	06/14/2023		

Figure 2.3.2 – My Tasks Page Mockup Name

## 2.3.3 Description of Changes

1. Expedited Indicator Icon – Modify the icon to display a tooltip on mouseover to display the type of expedited service. (Reference Figure 2.3.2 for display/placement)

## 2.3.4 Page Location

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

## 2.3.5 Security Updates

N/A

## 2.3.6 Page Mapping

N/A

## 2.3.7 Page Usage/Data Volume Impacts

N/A

## 2.4 Task Search Export: Template

### 2.4.1 Overview

This section outlines the modifications to the Task Pop-Up Export template to display the new Expedited type.

### 2.4.2 Task Search Export Mockup

	I	J	K	L	M	N	O
Type	Status	Priority	Expedite	Worker Assign	Bank Assigned	Data Create	Date
	Assigned	Critical				05/04/2023	
	Assigned	Critical	ES			05/04/2023	
	Assigned	Critical	IN			05/04/2023	
	Assigned	Critical	ES			05/04/2023	
	Assigned	Critical	ES/IN			05/04/2023	
	Assigned	Critical	Other			05/04/2023	
	Assigned	Critical				05/04/2023	
	Assigned	Critical				05/04/2023	

Figure 2.4.2 – Task Search Export

### 2.4.3 Description of Changes

1. “Expedited” column – Modify this column to display the appropriate Expedited value for each Task when available.

### 2.4.4 Page Validations

N/A

### 2.4.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

Page is accessible through Utility bar's Tasks Option.

### 2.4.6 Security Updates

N/A

### 2.4.7 Page Mapping

N/A

## 2.4.8 Page Usage/Data Volume Impacts

N/A

## 2.5 Clearance Processing

### 2.5.1 Overview

This section describes updates to the Clearance/Clearance BenefitsCal Task processing.

### 2.5.2 Description of Changes

1. Modify the logic of the "Clearance" Automated Action to set the Task Language to the same language selected in the "What language do you prefer to speak?" question in the Application Registration Summary page. If this attribute is not available, the Task language will default to English.
2. Modify the logic of the "Clearance" Automated Action to include a comma delimited alphabetical list of programs associated to the Application Registration Summary page in the Long Description of the Task in this format:  
"Clearance: <programs>"  
Example: "Clearance: CalFresh, CalWORKs, Medi-Cal"
3. Modify the logic of the "Clearance" Automated Action to set a value for the "Expedited" attribute of the Task when available based on mapping information in the [Appendices](#) which associates Application Registration Summary page questions to Expedited values (ES, IN, ES/IN).

### 2.5.3 Page Validation

N/A

### 2.5.4 Security Updates

N/A

### 2.5.5 Page Mapping

N/A

## 2.5.6 Page Usage/Data Volume Impacts

N/A

## 2.6 Application Transfer API

### 2.6.1 Overview

The Application Transfer API is a RESTful service that accepts the e-Application information from the Self-Service Portal and stores it in the CalSAWS. It also generates the "Clearance BenefitsCal" task which is assigned to a bank that accepts tasks with e-Application task category.

### 2.6.2 Description of Change

1. Modify the logic of the "Clearance BenefitsCal" Task to include a comma delimited alphabetical list of programs being applied for in the Long Description field in this format:  
" <programs>"  
Example: "CalFresh, CalWORKs, Medi-Cal"
2. Modify the logic of the "Clearance BenefitsCal" Task to set the appropriate Expedited attribute value (ES, IN or ES/IN) by referencing the e-Application "Expedited Services/Immediate Need/Immediate MediCal" attribute, which has the same values (ES, IN, ES/IN).

For example, if a Clearance BenefitsCal Task is created from an e-Application with a "Expedited Services/Immediate Need/Immediate MediCal" value of "ES", the resulting Task will have an Expedited value of "ES" as well.

### 2.6.3 Partner Integration Testing

Yes

### 2.6.4 Execution Frequency

Real-time

### 2.6.5 Key Scheduling Dependencies

N/A

### 2.6.6 Counties Impacted

CalSAWS counties

### **2.6.7 Category**

N/A

### **2.6.8 Data Volume/Performance**

N/A

### **2.6.9 Interface Partner**

BenefitsCal

### **2.6.10 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.)

## **2.7 Intake Automated Action Processing**

### **2.7.1 Overview**

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

### **2.7.2 Description of Changes**

1. When assigning programs on the Pending Assignment List as part of the intake flow, if a Clearance or Clearance BenefitsCal Task is being processed, it will automatically be Completed before the Intake Task is created.

Update this processing to preserve the Expedited attribute value of the clearance Task into the Intake Task. This allows the Intake Task to indicate ES, IN, ES/IN if the clearance Task also indicated such.

### **2.7.3 Page Validation**

N/A

### **2.7.4 Security Updates**

N/A

### **2.7.5 Page Mapping**

N/A

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

N/A

## **2.8 Clearance Task Guided Navigation**

### **2.8.1 Overview**

This section outlines modifications to Clearance Task guided navigation.

### **2.8.2 Description of Changes**

1. Update the guided navigation routing for "Clearance" Tasks to navigate to the associated Application Registration Summary page directly.
2. Update the guided navigation routing for "Clearance BenefitsCal" Tasks to navigate to the associated e-Application Summary page directly.
3. Update the guided navigation routing for "Clearance CMIPSI" Tasks to navigate to the associated IHSS Referral Detail page directly.
4. Update the guided navigation routing for "Clearance ICT" Tasks to navigate to the associated ICT Detail page directly.

Guided navigation for each of the above pages will display the resulting page in View mode.

### **2.8.3 Page Location**

N/A

### **2.8.4 Security Updates**

N/A

### **2.8.5 Page Mapping**

N/A

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

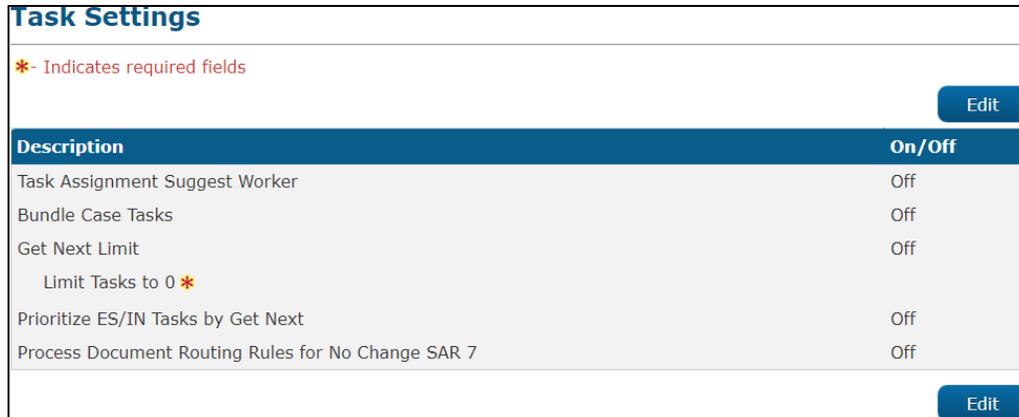
N/A

## 2.9 Task Settings Page

### 2.9.1 Overview

This section outlines the modifications to the Task Settings page to add a new Task Setting to allow Get Next to prioritize ES/IN Tasks.

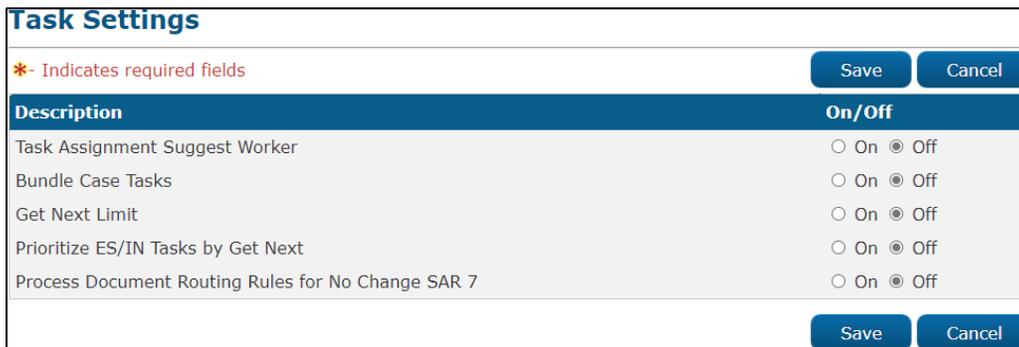
### 2.9.2 Task Settings



The mockup shows a 'Task Settings' page with a title bar, a legend for required fields, and a table of settings. An 'Edit' button is located in the top right corner.

Description	On/Off
Task Assignment Suggest Worker	Off
Bundle Case Tasks	Off
Get Next Limit	Off
Limit Tasks to 0 *	
Prioritize ES/IN Tasks by Get Next	Off
Process Document Routing Rules for No Change SAR 7	Off

Figure 2.9.2-1 – Task Settings Page View Mockup



The mockup shows the 'Task Settings' page in edit mode. It includes 'Save' and 'Cancel' buttons in the top right. The 'On/Off' column in the table now uses radio buttons, with 'Off' selected for all settings.

Description	On/Off
Task Assignment Suggest Worker	<input type="radio"/> On <input checked="" type="radio"/> Off
Bundle Case Tasks	<input type="radio"/> On <input checked="" type="radio"/> Off
Get Next Limit	<input type="radio"/> On <input checked="" type="radio"/> Off
Prioritize ES/IN Tasks by Get Next	<input type="radio"/> On <input checked="" type="radio"/> Off
Process Document Routing Rules for No Change SAR 7	<input type="radio"/> On <input checked="" type="radio"/> Off

Figure 2.9.2-2 – Task Settings Page Edit Mockup

### 2.9.3 Description of Changes

1. Update the Task Settings page to include a new "Prioritize ES/IN Tasks by Get Next" setting. The settings will display "On" and "Off" radio-button options and default to "Off" for all counties.
2. Update Get Next processing logic to apply an initial Task ordering condition if this setting is turned on for the county to give Tasks with an Expedited value of "ES", "IN" or "ES/IN" priority before the additional Get Next ordering criteria are applied.

This Task Setting allows a county to enable prioritization of ES/IN Tasks by Get Next processing.

#### 2.9.4 Page Location

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

#### 2.9.5 Security Updates

N/A

#### 2.9.6 Page Mapping

N/A

#### 2.9.7 Page Usage/Data Volume Impacts

N/A

### 3 SUPPORTING DOCUMENTS

---

N/A

## 4 REQUIREMENTS

---

N/A

## 5 MIGRATION IMPACTS

---

N/A

## 6 OUTREACH

---

N/A

## 7 APPENDIX

---

### 7.1 Application Registration Summary page ES Questions

'Yes' to one or more of the following questions in the Application Registration Summary page will set the Expedited value to 'ES' for the Clearance Task.

Expedited Service Question	ES
Is your household's gross income less than \$150 and cash on hand, checking and savings accounts of \$100 or less?	Yes
Is your household's gross income and liquid resources less than the combined rent/ mortgage and utilities?	Yes
Is your household a migrant/ seasonal farm worker household with liquid resources not exceeding \$100?	Yes

### 7.2 Application Registration Summary page IN Questions

'Yes' to one or more of the following questions in the Application Registration Summary page will set the Expedited value to 'IN' for the Clearance Task.

Immediate Need Question	IN
Have your utilities been shutoff or do you have a shut-off notice?	Yes
Will your food run out in 3 days or less?	Yes
Do you need essential clothing, such as diapers or clothing needed for cold weather?	Yes
Do you need help with transportation to get food, clothing, medical care or other emergency item(s)?	Yes
Does anyone have a personal emergency?	Yes

If at least one ES question and at least one IN question are answered as Yes on the Application Registration Summary page, the Expedited value for the Clearance Task will be set to "ES/IN".

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-262868

Add Threshold Translations for IAR Split CAPI  
Payment Reason and message

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Ramya YK
	Reviewed By	Lianel Richwin

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
07/07/2023	1.0	Initial Draft	Ramya YK

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add Threshold Translations for IAR Split CAPI Payment Reason .....	5
	2.1.1 Overview .....	5
	2.1.2 NOA Verbiage .....	5
	2.1.3 NOA Variable Population .....	5
	2.1.4 Form/NOA Generation.....	5
	2.2 Add Threshold Translations for CAPI NOA Message Fragment.....	5
	2.2.1 Overview .....	5
	2.2.2 NOA Verbiage .....	6
	2.2.3 NOA Variable Population .....	6
	2.2.4 Form/NOA Generation.....	6
	2.3 Add Threshold Translations for CAPI NOA Action Fragment.....	6
	2.3.1 Overview .....	6
	2.3.2 NOA Verbiage .....	6
	2.3.3 NOA Variable Population .....	7
	2.3.4 Form/NOA Generation.....	7
3	Supporting Documents .....	7
4	Requirements.....	7
	4.1 Project Requirements.....	7

# 1 OVERVIEW

---

The purpose of this SCR is to add Threshold languages for IAR Split CAPI Payment NOA to CalSAWS.

## 1.1 Current Design

Currently IAR CAPI Split Payment NOA available only in English and Spanish Languages.

## 1.2 Requests

1. Add Threshold Translation for IAR Split CAPI Payment Reason  
CI\_AP\_CAPI\_APPROVED\_GR\_CALWIN\_C703
2. Add Threshold Translations for IAR Split CAPI Payment message  
CI\_AP\_MESSAGE2
3. Add Threshold Translations for IAR Split CAPI Payment Action CI\_AP\_ACTION5.

## 1.3 Overview of Recommendations

1. Adding Threshold languages for IAR Split CAPI Payment Reason (Snippet Id - 7839)  
**Languages Include:** Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese.
2. Adding Threshold Translations for IAR Split CAPI Payment Message (Snippet Id - 5143)  
**Languages Include:** Arabic, Hmong and Lao
3. Adding Threshold Translations for IAR Split CAPI Payment Action (Snippet Id - 4115)  
**Languages Include:** Arabic, Hmong and Lao

## 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 Translations for IAR Split CAPI Payment Reason

#### 2.1.1 Overview

Adding Threshold Translations for IAR Split CAPI Payment Reason.

**Reason Fragment Name and ID:**

CI\_AP\_CAPI\_APPROVED\_GR\_CALWIN\_C703 (Fragment Id: 7839)

**Sate Form/NOA:** NA 693 (09/2022)

**Current NOA Template:** CI\_NOA\_TEMPLATE (3697)

**Program(s):** CAPI

**Action Type(s):** Approval

**Fragment Level:** Program

**Include NA Back 9:** Yes

**Existing Languages:** English, Spanish

#### 2.1.2 NOA Verbiage

Add CAPI NOA Reason for IAR Split CAPI Payment in threshold languages.

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

**NOA Mockups/Examples:** See Supporting Documents

#### 2.1.3 NOA Variable Population

No updates to variable population

#### 2.1.4 Form/NOA Generation

No updates to existing trigger conditions.

### 2.2 Add Threshold Translations for CAPI NOA Message Fragment

#### 2.2.1 Overview

Adding Threshold Translations for CAPI NOA Fragment.

**Message Fragment Name and ID:** CL\_AP\_MESSAGE2 (Fragment ID: 5143)

**State Form/NOA:** NA 693 (09/2022)

**Current NOA Template:** CL\_NOA\_TEMPLATE (3697)

**Program(s):** CAPI

**Action Type(s):** Approval

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

### 2.2.2 NOA Verbiage

Add CAPI NOA Reason fragment in threshold languages.

**Add Threshold languages:** Arabic, Hmong and Lao

**NOA Mockups/Examples:** See Supporting Documents

### 2.2.3 NOA Variable Population

No updates to variable population

### 2.2.4 Form/NOA Generation

N/A.

## 2.3 Add Threshold Translations for CAPI NOA Action Fragment

### 2.3.1 Overview

Adding Threshold Translations for CAPI NOA Action Fragment.

**Action Fragment Name and ID:** CL\_AP\_ACTION5 (Fragment ID: 4115)

**State Form/NOA:** NA 693 (09/2022)

**Current NOA Template:** CL\_NOA\_TEMPLATE (3697)

**Current Program(s):** CAPI

**Current Action Type:** Approval

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

### 2.3.2 NOA Verbiage

Add CAPI Action fragment in threshold languages.

**Add Threshold languages:** Arabic, Hmong and Lao

**NOA Mockups/Examples:** See Supporting Documents

### 2.3.3 NOA Variable Population

No updates to variable population

### 2.3.4 Form/NOA Generation

N/A.

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	IAR Split CAPI Payment NOA	Supporting Document.zip

## 4 REQUIREMENTS

### 4.1 Project Requirements

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

	<p>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>	
--	---	--

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-263213

Update the Referral Portal (CalSAWS Admin Portal) to allow user to update referral status.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erika Kusnadi-Cerezo
	Reviewed By	Michael Wu, Naga Chinduluru, Aaron Fowler, William Baretzky, Himanshu Jain, Chitra Barsagade, Raji Reddy, Sumeet Patel

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/01/2022	1.0	Initial	Kusnadi.E
7/02/2023	1.1	Updates made after further review: <ol style="list-style-type: none"> <li>1. Updated Figure 2.7.12 from Section 2.2.2 to change the field name from Referral status to Referral Status to match information from CA-263212.</li> <li>2. Updated Section 2.3.10 to N/A</li> <li>3. Updated Figure 2.4.2 and Figure 2.4.3 from Section 2.4.2 since the Case# information will not be included as part of the URL Parameters (Case# will be displayed on the Case Number column only).</li> <li>4. Project Requirement is added to Section 2.4</li> </ol>	Kusnadi.E
8/01/2023	1.1	Added Section 2.6	Baretzky.W

## Table of Contents

1	Overview .....	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions .....	5
2	Recommendations.....	6
2.1	Online User Action Audit Report .....	6
2.1.1	Overview .....	6
2.1.2	Online User Action Audit Report Mockup.....	6
2.1.3	Description of Changes .....	6
2.1.4	Page Location .....	6
2.1.5	Security Updates.....	7
2.1.6	Page Mapping.....	7
2.1.7	Page Usage/Data Volume Impacts .....	7
2.2	CalSAWS Administrator Portal .....	7
2.2.1	Overview .....	7
2.2.2	CalSAWS Administrator Portal Mockup.....	8
2.2.3	Description of Changes .....	9
2.2.4	Page Location .....	10
2.2.5	Security Updates.....	10
2.2.6	Page Mapping.....	10
2.2.7	Page Usage/Data Volume Impacts .....	10
2.3	ReferralStatus API .....	10
2.3.1	Overview .....	10
2.3.2	Description of Change.....	11
2.3.3	Partner Integration Testing .....	11
2.3.4	Execution Frequency.....	11
2.3.5	Key Scheduling Dependencies.....	11
2.3.6	Counties Impacted .....	11
2.3.7	Category .....	11
2.3.8	Data Volume/Performance.....	11
2.3.9	Interface Partner.....	11

2.3.10	Failure Procedure/Operational Instructions.....	12
2.4	CalSAWS User Audit Report .....	12
2.4.1	Overview .....	12
2.4.2	CalSAWS User Audit Report Mockup .....	12
2.4.3	Description of Change.....	13
2.4.4	Report Location .....	13
2.4.5	Counties Impacted .....	13
2.4.6	Security Updates.....	13
2.4.7	Report Usage/Performance .....	13
2.5	Create a new Staff profile .....	14
2.5.1	Overview .....	14
2.5.2	Description of Change.....	14
2.5.3	Estimated Number of Records Impacted/Performance.....	14
2.6	Automated Regression Test.....	14
2.6.1	Overview .....	14
2.6.2	Description of Change.....	14
3	Supporting Documents .....	14
4	Requirements.....	15
4.1	Project Requirements.....	15

# 1 OVERVIEW

---

As part of CA-263212 the CalSAWS Administrator Portal was updated to include the functionality of the Referral Portal. This allow external agencies/providers to view referral information that was created in CalSAWS. As part of this SCR, the Referral Portal Summary page will be updated to allow users the ability to update the Referral Status and Status reason for the referral.

## 1.1 Current Design

As part of CA-263212 the CalSAWS Administrator Portal was updated to include the functionality of the Referral Portal. This allow external agencies/providers to view referral information that was created in CalSAWS.

## 1.2 Requests

Updated the Referral Portal Summary page to include the ability for user to update the Referral Status and the Status Reason for a referral.

## 1.3 Overview of Recommendations

1. Update the Referral Portal Summary to include the ability to Edit the information that will allow the user to update the Referral Status and status Reason.
2. Create a brand new ReferralStatus API
3. Update the Online User Action Audit Report page to change the option of Report Type from Child Care Portal to CalSAWS Admin Portal.
4. Update the CalSAWS User Audit Report to rename the reference of Child Care Portal to Admin Portal.
5. The CalSAWS User Audit Report will include Audit for the Referral Portal
6. Create a new Staff Record in CalSAWS that will be used when the Referral Status and Status Reason are updated through the CalSAWS Administrator Portal.

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out in the design.
2. 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

### 2.1 Online User Action Audit Report

#### 2.1.1 Overview

The Online User Action Audit Report page allows users to generate the Audit report for either the CalSAWS application or the CalSAWS Administrator Portal (previously the Child Care Portal) for a specific user. This SCR will relabel the Report Type for the Child Care Portal to CalSAWS Admin Portal.

#### 2.1.2 Online User Action Audit Report Mockup

The screenshot shows a web form titled "Online User Action Audit Report". At the top right, there are three buttons: "Audit Report", "Audit History", and "Logout". Below the title, a legend indicates that an asterisk (\*) denotes required fields. The form contains several sections: "Select audit report type (e.g. CalSAWS or CalSAWS Admin Portal)" with a dropdown menu currently set to "CalSAWS Admin Portal"; "Select a county to run the report on" with a "County:" label and a dropdown menu; "Enter the user name, such as john.d@c50" with a "User Name:" label and a text input field followed by a "Select" button; "And/Or enter the case number" with a "Case Number:" label and a text input field; and "The maximum allowed audit range is 6 months:" with a "Begin Date:" label, a date input field, and a calendar icon. On the right side, there is an "End Date:" label, a date input field showing "06/12/2023", and a calendar icon. A "Submit" button is located at the bottom right of the form.

Figure 2.6.1 – Online User Action Audit Report

#### 2.1.3 Description of Changes

1. Update the message "Select audit report type (e.g. CalSAWS or Child Care Portal)" to "Select audit report type (e.g. CalSAWS or CalSAWS Admin Portal)".
2. Rename the Report Type of "Child Care Portal" to be "CalSAWS Admin Portal".

**Note:** This section is to only update the name of the Report Type of Child Care Portal to CalSAWS Admin Portal. There is no change what field are required, security changes. Changes to the Audit API will be covered under Section 2.10 and changes to the Audit Report for the CalSAWS Admin Portal will be covered under Section 2.11.

#### 2.1.4 Page Location

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

### **2.1.5 Security Updates**

N/A – No change in Security.

### **2.1.6 Page Mapping**

Update Page Mapping for the new fields being added.

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

N/A

## **2.2 CalSAWS Administrator Portal**

### **2.2.1 Overview**

The CalSAWS Administrator Portal allow users with the proper Security Role access to view referral information. This SCR will update the Referral Portal Summary page to allow users to update the Referral Status and the Status Reason through the portal.

## 2.2.2 CalSAWS Administrator Portal Mockup

The screenshot shows the 'Summary' section of the CalSAWS Administrator Portal in view mode. At the top, there is a navigation bar with the CalSAWS logo on the left and 'REPORT AN ISSUE' and 'LOGOUT' buttons on the right. Below the navigation bar, there is a link to 'Return to Dashboard'. The main content area is titled 'Summary' and contains a table with the following data:

Referral ID	Case Number	County	Referral Status	Status Reason	
1234567	A1235BC	Riverside	Referred	Eligible for Service	<a href="#">EDIT</a>

Below the table is the 'Referral Information' section, which is titled 'Referral ID: 1234567'. It contains two columns of information:

Referral Information	
First Name	Daisy
Middle Initial	-
Last Name	Duck
Date of Birth	10/05/1981
Language	English
Need Category	Dependent Care
Need Type:	Child Care
Need Begin Date	08/01/2022
Need End Date	08/01/2023
Program	Child Care

Below the referral information are two columns: 'Contact Information' and 'Case Manager Information'.

Contact Information	
Cell	(209)608-2689
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	123-567-8990
e-Mail Address	Minnie.Mouse@dland.org

Below the contact and case manager information is the 'Referral Comment' section, which contains a text area with the following text: 'Testing Comments for new referral portal. This will include information such as Funding Source if needed, if funding source is for Child Care etc.'

At the bottom of the form is the 'Children Information' section, which is titled 'Donald Duck' and 'Mickey Duck'. It contains a table with the following data:

Children Information	
First Name	Donald
Middle Initial	-
Last Name	Duck
Date of Birth	01/26/2012

Figure 2.2.1 – Referral Portal Summary – Summary Section upon loading/view mode

The screenshot shows the 'Summary' section of the CalSAWS Administrator Portal in edit mode. At the top, there is a navigation bar with the CalSAWS logo on the left and 'REPORT AN ISSUE' and 'LOGOUT' buttons on the right. Below the navigation bar, there is a link to 'Return to Dashboard'. The main content area is titled 'Summary' and contains a table with the following data:

Referral ID	Case Number	County	Referral Status	Status Reason	
1234567	0051044	Riverside	Accepted	Funding Available	<a href="#">SAVE</a> <a href="#">CANCEL</a>

Below the table is the 'Referral Information' section, which is titled 'Referral ID: 1234567'. It contains two columns of information:

Referral Information	
First Name	Donald
Middle Initial	-
Last Name	Duck
Date of Birth	01/26/2012

Figure 2.7.12 – Referral Portal Summary – Summary Section “Edit” mode

### 2.2.3 Description of Changes

1. Update the Referral Portal Summary page, to include an Edit mode.
  - a. Add an 'Edit' button as displayed on Figure 2.2.1.
    - i. The 'Edit' button will display upon loading of the Summary page and when the page is in View mode.
    - ii. Clicking the 'Edit' button will refresh the page and will take the Summary Page into an Edit mode.
    - iii. The 'Edit' button will be replaced by a 'Save' button when the Summary page is in Edit mode.
      1. Clicking the Save button will Save the selected information from the 'Referral Status' and 'Status Reason' field to the CalSAWS database and the Summary page will display in View mode.
      2. Save the information when users click on the Save button and the value selected from the Referral Status field and Status Reason field for retrieval by the CalSAWS audit applications.
    - iv. The Referral Status field will be a drop-down when the page is in Edit mode. The status that is pre-selected when the page initially load in Edit mode will be the latest status that was selected prior to the summary page going to the Edit mode. The option on the drop-down field will be:
      1. Referred
      2. Accepted
      3. Not Accepted.
    - v. The Status Reason field will be a drop-down when the page is in Edit mode. The status that is pre-selected when the page initially load in Edit mode will be the latest status that was selected prior to the summary page going to the Edit mode. The option on the drop-down field will be based on the value selected on the Referral Status field.
      1. When the Referral Status is Referred, the Status Reason will have the following options:
        - a. Eligible for Service
      2. When the Referral Status is Accepted, the Status Reason will have the following options:
        - a. Funding Available
        - b. Resource Available
      3. When the Referral Status is Not Accepted, the Status Reason will have the following options:
        - a. Funding Not Available
        - b. No Resource Available

- b. Add a 'Cancel' button.
  - i. The 'Cancel' button will display upon loading of the Summary page in Edit mode.
  - ii. Clicking the 'Cancel' button will take the user back to Summary page in View mode and the information being displayed will reflect the same information prior to the Summary page being accessed in Edit mode.
    1. Any updates/selection made during Edit mode will not be saved to the CalSAWS Database.
    2. Save the information when users click on the Cancel button for retrieval by the CalSAWS audit applications. (Please refer to the Audit Report mapping supporting document for details.)
2. Update Referral portal Dashboard Search page to save the search parameter information for retrieval by the CalSAWS audit applications. Please reference the Auditreportmapping on the Supporting document section for details.
3. Update the Referral Portal Summary page to save the new value that is selected on the Referral Status and Status Reason field when user clicks on the Save button for retrieval by the CalSAWS audit application. Please reference the Auditreportmapping on the Supporting document section for details.

#### **2.2.4 Page Location**

- **CalSAWS Administrator Portal → Referral Portal.**

#### **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 ReferralStatus API**

#### **2.3.1 Overview**

The ReferralStatus API is a RESTful webservice that will save the Referral Status and the Status Reason to the CalSAWS Database.

### **2.3.2 Description of Change**

1. Create a new RESTful Referral API webservice for the CalSAWS Administrator Portal in the PUT method based on the following parameters when a user update and Save the Referral Status and Status Reason for a referral on the CalSAWS Administrator Portal through the Referral portal section.
  - a. Referral ID – System generated identifier for a Referral record.
  - b. Referral Status – The Status of the Referral.
  - c. Status Reason – The Status Reason for the Referral.
  - d. Action Date – The effective date of the Referral Status and Status Reason update for an existing Referral record.
  - e. Update By – The Staff ID for the CalSAWS Administrator Portal.
    - i. This will be the Staff ID that will be created brand new in CalSAWS under Section 2.5.

### **2.3.3 Partner Integration Testing**

No

### **2.3.4 Execution Frequency**

Real-Time web service

### **2.3.5 Key Scheduling Dependencies**

N/A

### **2.3.6 Counties Impacted**

CalSAWS

### **2.3.7 Category**

N/A

### **2.3.8 Data Volume/Performance**

N/A

### **2.3.9 Interface Partner**

N/A

### 2.3.10 Failure Procedure/Operational Instructions

N/A

## 2.4 CalSAWS User Audit Report

### 2.4.1 Overview

The CalSAWS User Audit Report will provide an audit report for a specific users that will show activity record of what the user is doing within the CalSAWS Administrator Portal. This report will capture activity being done for both the Child Care Portal and the Referral Portal.

### 2.4.2 CalSAWS User Audit Report Mockup

User	Date	Case Number	Main Tab	Local Tab	Page Title	Url	Uri Parameters	Environment
UserName	06/01/2023 6:04:04 PM	A123456	Childcare Provider Portal	Person Search	Person Search Results	childcare/personsearch	caseNumber:A123456,firstName:John,lastName:Doe	pat1
UserName	06/01/2023 6:04:38 PM	A123456	Childcare Provider Portal	Person Search	Summary Page	childcare/personsummary	caseid:A123456,persid:4395ba3687890e873d2c:120cc972e:61ee576f62b26465a5a32d07c4fc02a7455264365f9	pat1

**Figure 2.4.1 – Report when user only have access to the Child Care Portal. (Data point have not change for Audit on the Child Care Portal).**

User	Date	Case Number	Main Tab	Local Tab	Page Title	Url	Uri Parameters	Environment
UserName	11/22/2023 6:04:04 PM		Referral Portal	Referral Search	Referral Search Results	referral/referralssearch	ReferralID:1234567,CountyCode:33	pat1
UserName	11/22/2023 6:05:38 PM	A123456	Referral Portal	Referral Search	Summary Page	referral/referralssummary	ReferralID:1234567,CountyCode:33	pat1
UserName	11/22/2023 6:10:38 PM	A123456	Referral Portal	Referral Summ	Summary Page	referral/referralsave	ReferralID:1234567,CountyCode:33,ReferralStatus:Accepted,StatusReason:FundingAvailable	pat1

**Figure 2.4.2 – Report when user only have access to the Referral Portal**

User	Date	Case Number	Main Tab	Local Tab	Page Title	Url	Url Parameters	Environment
User	11/21/2023 6:04:04 PM	A123456	Referral Portal	Referral Search	Referral Search Results	referral/referralssearch	ReferralID:1234567 County:Code:33	part1
User	11/21/2023 6:05:38 PM	A123456	Referral Portal	Referral Search	Referral Search Summary Page	referral/referralssearchsummary	ReferralID:1234567 County:Code:33	part1
User	11/24/2023 6:04:38 PM	A123456	Childcare Provider Portal	Person Search	Person Search Results	childcare/personsearch	caseNumber:A123456 firstName:John lastName:Die	part1

**Figure 2.4.3 – Report when user only have access to both the Child Care Portal and Referral Portal (Data point have not change for Audit on the Child Care Portal).**

### 2.4.3 Description of Change

1. Update the file name of the report when it is generated from “childCareUserAuditReport” to “CalSAWSAdminPortalUserAuditReport”.
2. Update the title of the report on the excel file from “Child Care Portal Audit results for User:” to “CalSAWS Admin Portal Audit results for User:”.
3. Update the name of the tab from “Child Care Portal User Audit Re” to “Admin Portal User Audit Re”.

### 2.4.4 Report Location

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

### 2.4.5 Counties Impacted

All Counties

### 2.4.6 Security Updates

N/A

### 2.4.7 Report Usage/Performance

N/A

## 2.5 Create a new Staff profile

### 2.5.1 Overview

This SCR will create a new Staff record in CalSAWS that will be used as the Staff/person that made updates to the Referral Status/Status Reason of a Referral through the CalSAWS Administrator portal.

### 2.5.2 Description of Change

1. Create a new Staff record in CalSAWS.
  - a. First Name: Referral
  - b. Last Name: Portal

### 2.5.3 Estimated Number of Records Impacted/Performance

1

## 2.6 Automated Regression Test

### 2.6.1 Overview

Create automated regression test scripts to verify that the status of a referral can be updated through the Referral Portal Summary page of the CalSAWS Administrator Portal.

### 2.6.2 Description of Change

Create regression scripts to verify the following on the Referral Portal Summary page of the CalSAWS Administrator Portal:

1. The 'Edit' button is available in view mode.
2. Clicking the 'Edit' button changes from view mode to edit mode.
3. The 'Save' button is available in edit mode.
4. The 'Referral Status' and 'Status Reason' fields are editable in edit mode.
5. Clicking the 'Save' button changes from edit mode to view mode.
6. If changes to the 'Referral Status' and 'Status Reason' values are changed and saved, the new values display on the Referral Detail page of the CalSAWS application.

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
--------	-----------------	-------------	------------

1	Audit Report	This will include information on the mapping for the audit report based on the action being done on the referral porta.	Auditreportmapping.xls
2	Interface	This attachment will contain mapping information	Data Dictionary for CA-263213.xlsx
3	Interface	ReferralStatus-API YAML	ReferralStatus-API.yaml
4	Interface	ReferralStatus-API HTML	ReferralStatus-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.	The CalSAWS administrator portal will be updated to allow external provider/agency to update the referral status directly from the portal. Lastly, the portal will also be updated so that audit report will start capturing information for the referral portal flow.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-263214

Rename the existing Child Cre Portal URL to  
Admin Portal

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, Dean Barrois	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/01/2022	1.0	Initial	Kusnadi.E

## Table of Contents

1	Overview .....	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions .....	5
2	Recommendations.....	5
2.1	Referral e-mail .....	5
2.1.1	Overview .....	5
2.1.2	Referral e-mail Mockup.....	5
2.1.3	Description of Changes .....	6
2.1.4	Page Location .....	6
2.1.5	Security Updates.....	6
2.1.6	Page Mapping.....	6
2.1.7	Page Usage/Data Volume Impacts .....	6
2.2	Resources section of the CalSAWS.org website .....	6
2.2.1	Overview .....	6
2.2.2	Resource section of the CalSAWS.org .....	7
2.2.3	Description of Changes .....	7
2.2.4	Page Location .....	7
2.2.5	Security Updates.....	7
2.2.6	Page Mapping.....	7
2.2.7	Page Usage/Data Volume Impacts .....	8
2.3	Updating the CalSAWS Administrator portal url.....	8
2.3.1	Overview .....	8
2.3.2	Description of Changes .....	8
2.3.3	Page Location .....	8
2.3.4	Security Updates.....	8
2.3.5	Page Mapping.....	8
2.3.6	Page Usage/Data Volume Impacts .....	8
2.4	ForgeRock Application.....	8
2.4.1	Overview .....	8
2.4.2	Description of Changes .....	9

	2.4.3 Page Location .....	9
3	Requirements.....	9
	3.1 Project Requirements.....	9

# 1 OVERVIEW

---

As part of CA-263212 the Child Care Portal was rebranded as the CalSAWS Administrator portal. This SCR will update the URL name from <https://childcare.calsaws.net/> to <https://admin.calsaws.net/>

## 1.1 Current Design

Currently, the CalSAWS Administrator Portal URL name is still referencing childcare.

## 1.2 Requests

Update the CalSAWS Administrator Portal URL from <https://childcare.calsaws.net/> to <https://adminportal.calsaws.net/>

## 1.3 Overview of Recommendations

1. Update the URL name for the CalSAWS Administrator Portal.
2. Update the hyperlink on the email that is sent from CalSAWS to the resource to point to the new URL name for the CalSAWS Administrator Portal.
3. Update the hyperlink on the Calsaws.org/resource to point to the new URL name for the CalSAWS Administrator Portal.
4. Update ForgeRock to add redirect URIs for the new URL to be used for the CalSAWS Administrator Portal.

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out in the design.

# 2 RECOMMENDATIONS

---

## 2.1 Referral e-mail

### 2.1.1 Overview

As part of CA-263212 CalSAWS is updated with the functionality to send referral e-mail to resources. The e-mail includes the hyperlink to the CalSAWS Administrator Portal. This SCR will update the hyperlink that is include on the email to point to the new URL for the CalSAWS Administrator portal.

### 2.1.2 Referral e-mail Mockup

N/A

### 2.1.3 Description of Changes

1. Update the hyperlink that is include on the body of the referral e-mail that CalSAWS sends out to the resource.
  - a. Update the CalSAWS Administrator Portal hyperlink from <https://childcare.calsaws.net/> to <https://adminportal.calsaws.net/>

### 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

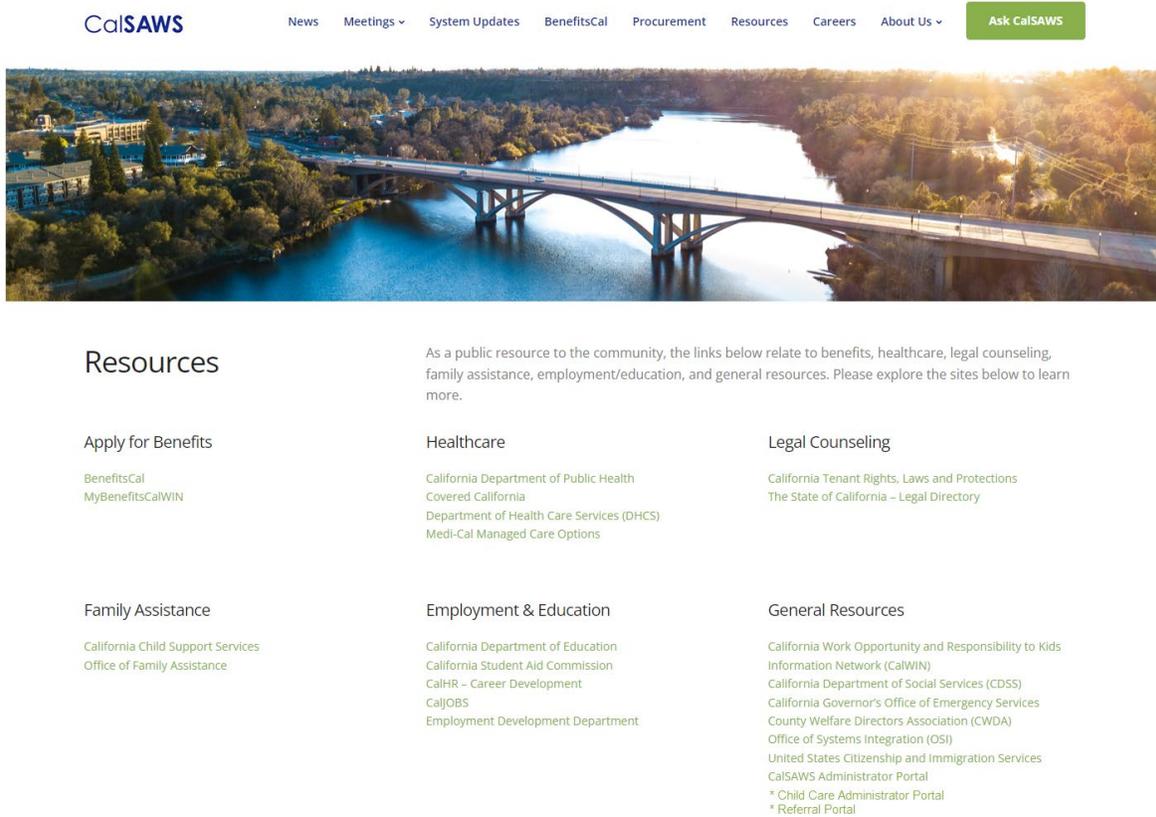
N/A

## 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 to access the CalSAWS Administrator Portal. This SCR will update the hyperlink for the CalSAWS Administrator Portal on the Resource section of the CalSAWS.org website.

## 2.2.2 Resource section of the CalSAWS.org



**Figure 2.2.1 Resources section of the CalSAWS.org (reference only)**

## 2.2.3 Description of Changes

1. Update the hyperlink for the CalSAWS Administrator Portal from <https://childcare.calsaws.net/> to <https://adminporta.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 Updating the CalSAWS Administrator portal url.

### 2.3.1 Overview

The CalSAWS Administrator portal URL is currently <https://childcare.calsaws.net/>. This SCR will update the URL to <https://adminportal.calsaws.net/>

### 2.3.2 Description of Changes

1. Update the current production URL “ <https://childcare.calsaws.net/>” for the CalSAWS Administrator Portal (previously the Child Care Administrator Portal) to <https://adminportal.calsaws.net/>.

**Note:** The same change will also be applied to the testing URLs.

### 2.3.3 Page Location

<https://adminportal.calsaws.net/>

### 2.3.4 Security Updates

N/A

### 2.3.5 Page Mapping

N/A

### 2.3.6 Page Usage/Data Volume Impacts

N/A

## 2.4 ForgeRock Application

### 2.4.1 Overview

The ForgeRock application is used to authenticate user that is logging in to the CalSAWS Administrator Portal. With the URL name for the CalSAWS Administrator portal being change, the ForgeRock application will need to redirect the URI to point to the new URL name.

### 2.4.2 Description of Changes

1. Add redirect URIs for the new URL to be used for the CalSAWS Administrator Portal.

**Note:** The same change will also be applied to the testing URLs.

### 2.4.3 Page Location

ForgeRock Application.

## 3 REQUIREMENTS

---

### 3.1 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.	The URL link will be updated for the Child Care portal in order to match the rename of the Child Care Portal to the Admin portal.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-264372

CalSAWS VA Expansion – Release 11

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

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
07/25/23	1.0	Original Draft	Uzochi Oparaji, Emily Best

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Internal VA Items .....	5
	2.1.1 Overview .....	5
	2.1.2 CalSAWS VA Mockups .....	5
	2.1.3 Description of Changes .....	6
	2.1.4 Page Location .....	31
	2.1.5 Security Updates.....	31
	2.1.6 Page Mapping.....	31
3	Supporting Documents .....	32
4	Requirements.....	33
	4.1 Project Requirements.....	33
5	Outreach.....	34
6	Appendix.....	34

# 1 OVERVIEW

## 1.1 Current Design

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

## 1.2 Requests

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

## 1.3 Overview of Recommendations

In Release 11 of the CalSAWS VA, we will release additional UCs within the VA and make enhancements to existing content. The scope of this SCR is as follows:

### Summary of New Content:

Category	Current Design	Release 11	Total (All Releases)
Number of UCs	234	18	252
Number of Keywords	1014	244	1258
Main Menu Branch	8	0	8
Sub-Menu Branches	33	2	35
Number of Edited UCs	N/A	10	N/A
New UX/UI Features	N/A	2	N/A

## 1.4 Assumptions

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

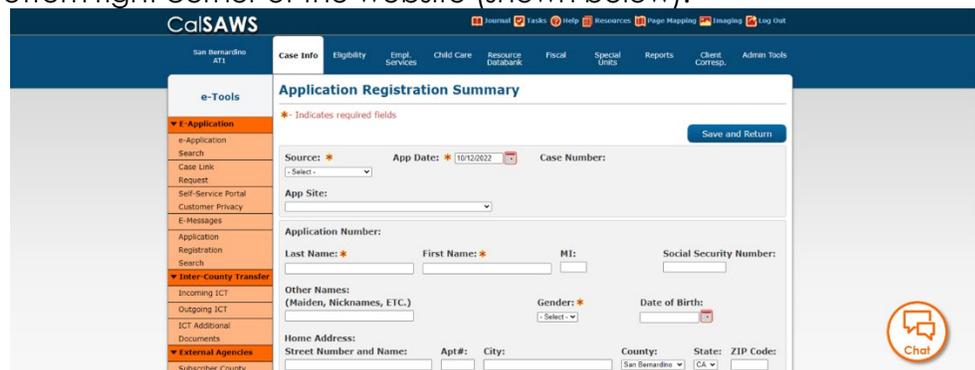


Figure 1.4.1 - VA Chat Icon

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

## 2 RECOMMENDATIONS

---

### 2.1 Internal VA Items

#### 2.1.1 Overview

In this release, we will be adding more content to the VA and making enhancements to existing content. This content will include 18 more UCs, 10 edits to existing UCs, 244 new keywords, 2 new sub-menu branches, and 2 new UX/UI features.

#### 2.1.2 CalSAWS VA Mockups

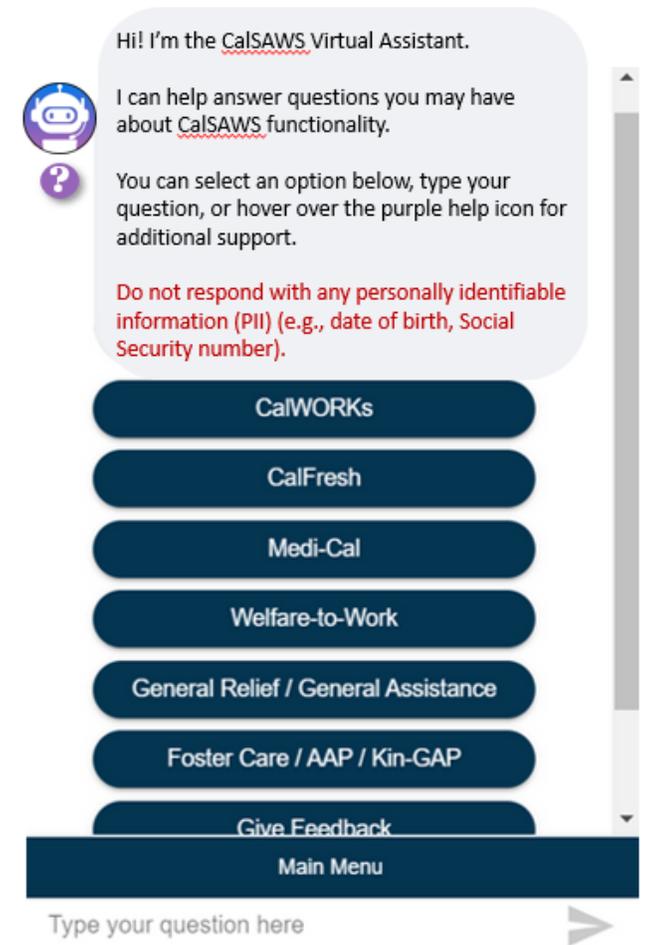


Figure 2.1 - VA Window, Chat Icon, Tool Tip Icon

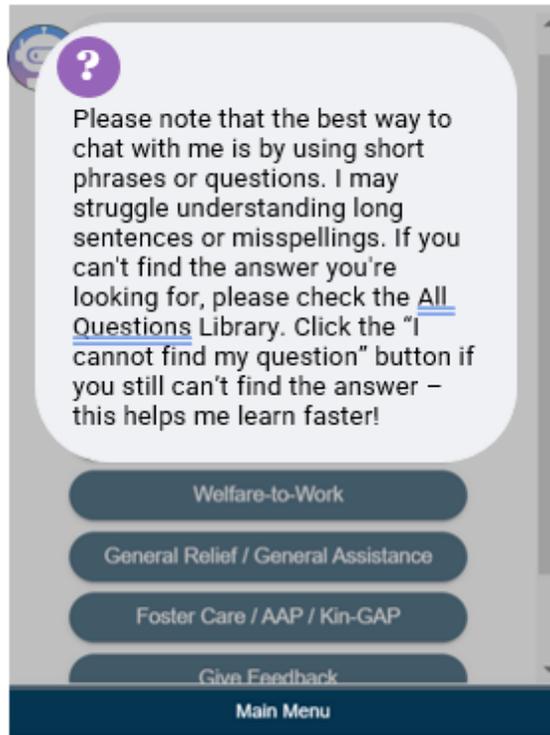


Figure 2.2 –Tool Tip Hover Feature

### 2.1.3 Description of Changes

#### 1. New UCs

Below is a table containing all new Use Cases in Release 11:

Program	Question	Answer	Buttons
N/A	Tool Tip	Please note that the best way to chat with me is by using short phrases or questions. I may struggle understanding long sentences or misspellings. If you can't find the answer you're looking for, please check the All Questions Library. Click the "I cannot find my question" button if you still can't find the answer – this helps me learn faster!	N/A
Medi-Cal, Intake Sub-Menu	How to Order a Birth Match in CalSAWS?	To request a birth match (Vital Statistics) for individuals born in California, you must enter the person's name and birth state. This is the minimum amount of data required to request a Vital Statistics match. To avoid MEDS alerts, you SHOULD complete the Birth County drop list,	<b>Button:</b> Vital Statistics (JA)  <b>Button:</b> More Medi-Cal-related Topics

		<p>Birth City field and Birth Certificate Information page section if the information is known or available.</p> <p>To order a birth match:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>Vital Statistics</b> link on the <b>Task</b> navigation bar</li> <li>4. On the <b>Vital Statistics List</b> page: <ol style="list-style-type: none"> <li>a. Click the <b>Add</b> button</li> </ol> </li> <li>5. On the <b>Vital Statistics Detail</b> page: <ol style="list-style-type: none"> <li>a. Select the <b>&lt;Applicant's Name&gt;</b> from the <b>Name</b> drop list</li> <li>b. Select <b>&lt;Yes or No&gt;</b> from the <b>Was this person born in a US State/Territory</b> drop list if not already defaulted to Yes</li> <li>c. Select the <b>&lt;Applicant's Birth State&gt;</b> from the <b>Birth State/U.S. Territory</b> drop list</li> <li>d. Select <b>Pending</b> status in the <b>Verified</b> drop down</li> </ol> </li> <li>6. <b>Request Birth Match</b> button will display in <b>View</b> mode when the: <ul style="list-style-type: none"> <li>• Vital Statistics Detail page has been saved</li> <li>• Birth state is California, and</li> <li>• Page verification status is not Verified</li> </ul> </li> </ol> <p><b>Note:</b> If you are requesting a match for a deceased person, the date of death must be included on the Individual Demographics Detail page.</p>	<p><b>Button:</b> More Intake-related Topics</p>
<p>Medi-Cal, EDBC Sub-Menu, Continuous Coverage Unwinding Sub-Menu</p>	<p>How to override Medi-Cal EDBC?</p>	<p>To override Medi-Cal EDBC:</p> <ol style="list-style-type: none"> <li>1. On the <b>Medi-Cal EDBC Override Summary</b> page: <ol style="list-style-type: none"> <li>a. Click the <b>Override Medi-Cal Summary</b> button</li> </ol> </li> <li>2. On the <b>Medi-Cal EDBC Override List</b> page: <ol style="list-style-type: none"> <li>a. Select <b>&lt;EDBC Override Reason&gt;</b> from the <b>EDBC Override Reason</b> drop list</li> </ol> </li> </ol>	<p><b>Button:</b> EDBC Overriding Program Configuration (JA)</p> <p><b>Button:</b> More EDBC-related Topics</p>

		<p>b. Click the <b>Override</b> button in the <b>Medi-Cal Summary</b> page section to override the person's configuration</p> <p>c. Click the <b>Save and Return</b> button</p> <p>3. On the <b>Medi-Cal EDBC Override Detail</b> page:</p> <p>a. Fill out the required fields: <b>Test Result, SOC, % Obligation, Aid Code, Member Tested, Role, and Role Reason</b></p> <p>b. Click the <b>Save and Return</b> button</p> <p>4. <b>Accept and Save</b> the following pages to successfully complete the override:</p> <p>a. <b>Medi-Cal EDBC Override Detail</b></p> <p>b. <b>Medi-Cal EDBC Override List</b></p> <p>c. <b>Medi-Cal EDBC Summary</b></p> <p>d. <b>EDBC List</b></p> <p><b>Note:</b> When completing an override, the system will not generate a notice of action and the user will need to manually generate one. In addition, if the prior month was an override and the come-up month is run through regular EDBC, the system will not be able to recognize the change in benefits and a manual notice of action will also need to be created.</p> <p><b>Note:</b> This is an administrative function that may not be available to all Users.</p>	<p><b>Button:</b> More Continuous Coverage Unwinding-related Topics</p>
<p>Intake Sub-Menu, CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief/ General Assistance, Foster Care / AAP / Kin-GAP</p>	<p>How to add a new program to an existing case?</p>	<p>The following instructions are to add a program to an existing case and assign a worker to the program. The steps assume you are in the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>New Program</b> link in the <b>Task</b> navigation bar</li> <li>4. On the <b>Program Detail</b> page, select <b>&lt;Program you are adding&gt;</b> from the <b>Select Program</b> drop list, and click the <b>Go</b> button</li> </ol>	<p><b>Button:</b> Add a Program to an Existing Case Immediate Need, Homeless Assistance - Temp and Perm (JA)</p> <p><b>Button:</b> Worker Assignment</p> <p><b>Button:</b> More Intake-related Topics</p>

		<p>5. On the <b>New/Reapplication Detail</b> page:</p> <ol style="list-style-type: none"> <li>Select <b>&lt;Primary Applicant&gt;</b> from the <b>Primary</b> drop list</li> <li>Enter <b>&lt;Application Date&gt;</b> in the <b>Application Date</b> field</li> <li>Enter <b>&lt;Beginning Date of Aid&gt;</b> in the <b>Requested BDA</b> field</li> <li>Select <b>&lt;Source&gt;</b> from the <b>Source</b> drop list</li> <li>Enter the <b>&lt;Date Requested by the customer&gt;</b> in the <b>Request Date</b> field, if necessary</li> <li>Click the <b>&lt;Name&gt;</b> checkbox for each person applying for aid</li> <li>Click the <b>Save and Return</b> button</li> </ol> <p>6. On the <b>Program Detail</b> page, click the <b>Save and Return</b> button</p> <p>For the complete set of instructions, click the button below.</p>	<p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
<p>CalFresh, CalWORKs, General Relief/ General Assistance, Foster Care / AAP / Kin-GAP, RDB Sub-Menu</p>	<p>How to add a case payee?</p>	<p>To add a case payee in the system:</p> <ol style="list-style-type: none"> <li>Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>Select <b>Case Summary</b> from the <b>Local</b> navigation bar</li> <li>Click the <b>View Details</b> link under the relevant program</li> <li>On the <b>&lt;Program&gt;</b> page: <ol style="list-style-type: none"> <li>Click on <b>Edit</b></li> <li>Click on <b>Add</b> under <b>Administrative Roles</b></li> <li>Select <b>Payee</b> in the <b>Administrative Role</b> drop down</li> <li>Select the applicable sub-type in the <b>Payee Sub-Type</b> drop down</li> <li>Select the <b>Name of the Payee</b> in the <b>Name</b> drop down</li> <li>Enter <b>Begin Month</b></li> <li>Click <b>Save and Return</b></li> </ol> </li> </ol>	<p><b>Button:</b> More Resource Databank-related Topics</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p>

		<p>5. On the <b>&lt;Program&gt; Detail</b> page, click Save and Return</p> <p><b>Note:</b> When adding a FC/Kin-GAP/AAP payee, you must first add the payee into the Resource Databank.</p>	<p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
Workload/Case Assignment Sub-Menu	What are some tips for managing caseloads?	<p>The CIT infographic below contains helpful tips about managing caseloads. This information includes caseload types, no closed caseloads, case assignment, and viewing caseloads.</p> <p>Click the button below to be taken to the infographic.</p>	<p><b>Button:</b> CIT 1089-23 Caseloads Infographic</p> <p><b>Button:</b> More Workload / Case Assignment-related Topics</p>
Discontinuances Sub-Menu, Intake Sub-Menu, SAR 7 Sub-Menu, CalWORKs, CalFresh	How to initiate the restoration of aid waiver?	<p>Benefits can be restored within 30 days following the effective date of a discontinuance under the Restoration of Aid Waiver. Once the household provides the missing report, required verification and/or other required verification, benefits will be prorated beginning on the date that the household took the required action to re-establish eligibility.</p> <p>To initiate the restoration of aid waiver, on the Case Summary of a discontinued case, take the following steps:</p> <ol style="list-style-type: none"> <li>1. Expand the discontinued program (CalWORKs or CalFresh), click on <b>View Details</b></li> <li>2. On the <b>&lt;Program&gt; Detail</b> page, scroll down to <b>Program Persons</b> and click on the <b>Rescind</b> button</li> <li>3. On the <b>Rescind Detail</b> page, click on the <b>Rescind Reason</b> drop down and select <b>Restoration of Aid Waiver</b></li> <li>4. A <b>Comply Date</b> box will populate, select the date that the household complied with the required action to re-establish eligibility</li> <li>5. Under <b>Select Effective Date to Rescind</b>, select the individual(s) to rescind</li> </ol>	<p><b>Button:</b> More Discontinuances-related Topics</p> <p><b>Button:</b> More Intake-related Topics</p> <p><b>Button:</b> More SAR 7-related Topics</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p>

		<p>6. Click on <b>Save and Return</b></p> <p><b>Note:</b> Follow your county policy on when to use the Restoration of Aid waiver.</p>	
Students Sub-Menu	How to trigger student exemption consideration in CalSAWS?	<p>To have CalSAWS consider a student exemption, the customer will need to gather student eligibility information. Using the reported information, the user will verify the information per policy and enter the information on the data collection pages along with completing the <b>School Attendance</b> page.</p> <p>Data collection pages that may need to be updated based on the CF 6177 includes the <b>Employment, Medical Condition</b> and/or the <b>Income</b> page.</p> <p>For information on collecting student eligibility information, click the button below: Determine CF Student Eligibility.</p> <p>Once all data collection pages are completed, run EDBC.</p>	<p><b>Button:</b> Determine CF Student Eligibility</p> <p><b>Button:</b> Income Categories and Types in the System (JA)</p> <p><b>Button:</b> Disability Deprivation</p> <p><b>Button:</b> More Student-related Topics</p>
Intake Sub-Menu, CalFresh	How to deny a CalFresh case when participant failed to complete interview?	<p>Counties that have not opted into the CF Denial Batch EDBC PB00E472 must manually deny the CF intake application if the customer misses their CF intake interview. If the customer does not comply with their CF intake interview, 30 days following the application date, the worker must run EDBC and authorize the CalFresh denial.</p> <p>Use the Negative Action page with the reason 'CF Missed Interview (New Application/Recertification)' to deny the CalFresh application 30 days from the application date. The following steps assume you are in the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info</b> on the <b>Global</b> navigation bar</li> </ol>	<p><b>Button:</b> CalFresh-CF 386 Notice of Missed Interview (JA)</p> <p><b>Button:</b> More Intake-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p>

		<p>2. Select <b>Case Summary</b> from the <b>Local</b> navigation bar</p> <p>3. Click <b>Negative Action</b> on the <b>Task</b> navigation bar</p> <p>4. On the <b>Negative Action Detail</b> page</p> <ol style="list-style-type: none"> <li>Select the <b>&lt;Individual(s)&gt;</b> from the CalFresh program</li> <li>Select the <b>Negative Action Reason</b> of <b>&lt;CF Missed Interview (New Application / Recertification)&gt;</b></li> </ol> <p>5. Run EDBC, <b>Accept</b>, and <b>Save</b> the EDBC results</p> <p><b>Note:</b> Follow your county policy on when to take the appropriate negative action.</p>	
<p>EBT Sub-Menu</p>	<p>How to find monthly benefit allotment and issuance history?</p>	<p>The monthly benefit amount is specific to the case/program and the county. There are multiple ways to view the benefit amount based on the payment method.</p> <p>To find the current household allotment authorized:</p> <ol style="list-style-type: none"> <li>Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>Click <b>EDBC Results</b> in the <b>Task</b> navigation bar</li> </ol> <p>To find issuance history (what was issued previously or pending issuances):</p> <ol style="list-style-type: none"> <li>Place the cursor over <b>Case Info</b> on the <b>Global</b> navigation bar</li> <li>Select <b>Case Summary</b> from the <b>Local</b> navigator</li> <li>Click the <b>Issuance History</b> link in the <b>Task</b> navigation bar</li> <li>On the <b>Issuance History</b> page, click the <b>Control Number</b> hyperlink for the Issuance you wish to view</li> </ol> <p>To access what was issued on an EBT Card: EBT Card Transaction Detail (OLH):</p>	<p><b>Button:</b> Issuance – Issuance Record Statuses (JA)</p> <p><b>Button:</b> EBT Card Transaction Detail (OLH)</p> <p><b>Button:</b> More EBT-related Topics</p>

		<ol style="list-style-type: none"> <li>1. Place the cursor over <b>Case Info</b> or <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the <b>Local</b> navigator</li> <li>3. Click the <b>EBT Account List</b> link in the <b>Task</b> navigation bar</li> <li>4. On the <b>EBT Account Detail</b> page, click the <b>Account Number</b> hyperlink to access the <b>EBT Card Detail</b> page</li> </ol> <p>For more information about the interactions between issuance record statuses, click the button below.</p>	
Individual Demographics Sub-Menu	How to change a spoken or written language for customers?	<p>To add or change a spoken or written language for a customer in the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>Individual Demographics</b> link in the <b>Task</b> navigation bar to access the <b>Individual Demographics List</b> page</li> <li>4. Click the <b>Name</b> hyperlink or <b>Edit</b> button to access the <b>Individual Demographics Detail</b> page in <b>Edit</b> mode</li> <li>5. Under the <b>Sexual Orientation Gender Identity (SOGI) Information</b> section of the <b>Individual Demographics Detail</b> page, enter <b>Spoken Language</b> and/or <b>Written Language</b></li> <li>6. Click <b>Save and Close</b></li> </ol> <p>For more information on how to change a spoken or written language for customers, click the button below.</p>	<p><b>Button:</b> Individual Demographics Detail (OLH)</p> <p><b>Button:</b> Change Form Language</p> <p><b>Button:</b> More Individual Demographics-related Topics</p>
Students Sub-Menu, Income Sub-Menu	How to enter work study income?	<p>The following conditions must be met when a customer is assigned to a Work Study activity.</p> <ul style="list-style-type: none"> <li>• The customer must be in an Active status and assigned to one of the following activities: <ol style="list-style-type: none"> <li>1. Job Skills Training – Empl</li> </ol> </li> </ul>	<p><b>Button:</b> Employment Detail - Add or Edit (JA)</p> <p><b>Button:</b> More Income-related Topics</p>

		<p>2. Satisfactory School Attendance (REM) 3. Voc/Ed Training</p> <p>Work Study is added on the Employment Detail page by selecting Work Study as the Employment Type. Once the <b>Employment Detail</b> page is complete, the user will click the <b>Save and Return</b> button.</p> <p><b>Note:</b> For WTW, use the <b>Save and Add Activity</b> button and the System will navigate the user to the <b>Customer Activity Detail</b> page. On the <b>Customer Activity Detail</b> page, <b>Work Study</b> is pre-populated under the <b>Type</b> section. Whenever a Work Study activity is added, the <b>Type</b> column on this page displays as <b>Work Study</b>. The <b>Activity Number</b> field is blank as are all <b>Employment</b> activities.</p> <p>If the above conditions are not met, the System will prompt the message: "Save and Return – Participant is not currently active in an educational activity". For instructions on how to edit the Employment Detail page, click the button below.</p>	<p><b>Button:</b> More Student-related Topics</p>
<p>SAR 7 Sub-Menu</p>	<p>How to mark a SAR 7 as incomplete?</p>	<p>If you have received a SAR 7 with incorrect/incomplete data, mark the SAR 7 as incomplete with the following steps:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select the <b>Reporting</b> link from the <b>Local</b> navigation bar</li> <li>3. On the <b>Customer Reporting List</b> page, click the <b>Edit</b> button for the record <b>Type</b> of <b>SAR 7</b></li> <li>4. On the <b>Customer Reporting Detail</b> page: <ol style="list-style-type: none"> <li>a. select <b>&lt;Incomplete&gt;</b> from the <b>Status</b> drop list for CF and/or CW and enter <b>&lt;Date&gt;</b></li> </ol> </li> </ol>	<p><b>Button:</b> Semi-Annual Report (SAR 7) - Process (JA)</p> <p><b>Button:</b> More SAR 7-related Topics</p>

		<p>5. In the <b>PR – Incomplete Reasons</b> section, select the checkbox(es) next to the <b>Incomplete Reasons</b> as applicable</p> <p>6. Click the <b>Save and Return</b> button</p>	
Individual Demographics Sub-Menu	What is the DP Indicator (dangerous person)?	<p>The DP Indicator stands for dangerous person and is used to indicate that the customer is considered a risk to the worker and extra care should be taken when interacting with them.</p> <p>To view/update the DP Indicator within the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>Individual Demographics</b> link on the <b>Task</b> navigation bar</li> <li>4. On the <b>Individual Demographics List</b> page: <ol style="list-style-type: none"> <li>a. Click the <b>Edit</b> button associated with a person</li> </ol> </li> <li>5. On the <b>Individual Demographics Detail</b> page: <ol style="list-style-type: none"> <li>a. Enter information for all required fields</li> <li>b. Near the bottom of the page, select <b>&lt;Yes or No&gt;</b> from the <b>DP Indicator</b> dropdown</li> </ol> </li> <li>6. Click the <b>Save and Return</b> button</li> </ol> <p><b>Note:</b> The DP Indicator can also be viewed on the Case Summary page. It is indicated as an ‘*’ next to the customer’s name in the <b>All People Associated with the Case</b> section.</p> <p><b>Note:</b> Updating the indicator can only be completed by workers who have the appropriate security rights.</p>	<b>Button:</b> More Individual Demographics-related Topics
Workload/Case Assignment Sub-Menu	What do the icons on the Workload Inventory page mean?	<p>There are several different icons on the Workload Inventory page:</p> <p> (arrow on paper) means Export</p>	<b>Button:</b> Generate the Eligibility Workload Inventory and Monthly Productivity List

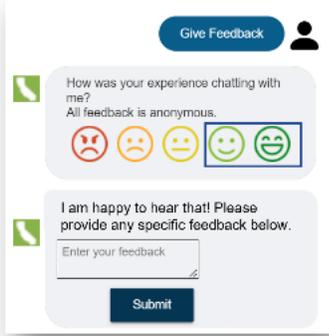
		 (exclamation point) means New Assignment  (photo icon) means Images Available  (Covered CA logo) means Information from Covered CA  For more information on exporting the Workload Inventory, click the first button below. For instructions on how to get to the Eligibility Workload Inventory page, click the second button below.	Export Reports (JA)  <b>Button:</b> Eligibility Workload Inventory (OLH)  <b>Button:</b> More Workload / Case Assignment-related Topics
Printing Sub-Menu	How to reprint a document / packet that was sent to a customer?	The following steps assume you are in the context of a case. To reprint a document or packet: 1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar 2. Select <b>Distributed Documents</b> from the <b>Local</b> navigation bar to access the <b>Distributed Documents Search</b> page 3. Enter the appropriate search criteria 4. Click the <b>Search</b> button 5. Click the <b>Details</b> hyperlink for the appropriate document 6. On the <b>Document Details</b> page: a. Click the <b>Reprint Locally</b> or <b>Reprint Centrally</b> button to access the <b>Print Reason</b> page b. Click <b>Print</b>	<b>Button:</b> Document Detail (JA)  <b>Button:</b> More Printing-related Topics
Printing Sub-Menu, Client Correspondence Sub-Menu	How to reprint NOAs?	To reprint a Notice of Action in the context of a case: 1. Place the cursor over <b>Eligibility, Empl. Services, or Child Care</b> on the <b>Global</b> navigation bar 2. Select <b>Distributed Documents</b> from the <b>Local</b> navigation bar 3. Enter information to search by 4. Click the <b>Search</b> button 5. Click the <b>Document Name</b> hyperlink and the <b>NOA Detail</b> page displays in a separate browser tab 6. On the <b>NOA Detail</b> page:	<b>Button:</b> Forms and NOAs (JA)  <b>Button:</b> More Printing-related Topics  <b>Button:</b> More Client Correspondence-related Topics

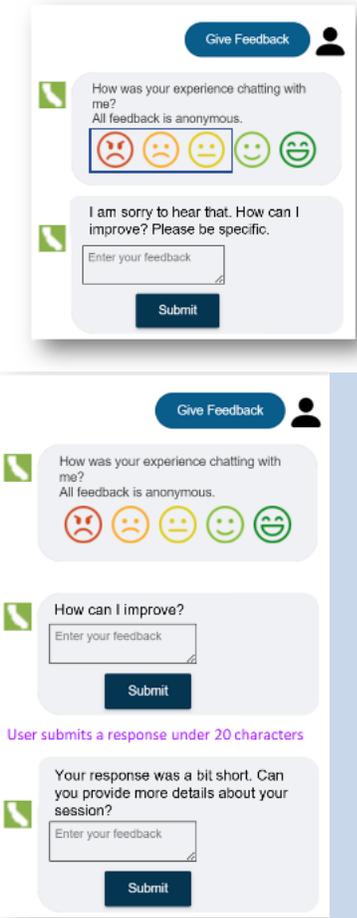
		<p>a. Click the <b>Reprint Locally</b> or the <b>Reprint Centrally</b> button</p> <p>b. Click the <b>Print</b> button</p> <p>c. Click the window <b>Close (X)</b> button</p>	
Medi-Cal, Continuous Coverage Unwinding Sub-Menu	What are the MC RE text message campaigns?	<p>CalSAWS recently released updated text messaging campaigns to support all 58 counties. Text messages are sent for various reasons such as appointment reminders, missed appointments, document status updates, or upcoming discontinuance.</p> <p>Text messages for MC RE packets will be sent when the status is updated to received, incomplete, or processed. MC RE packets include Non-MAGI, MAGI, and Mixed Household Packets.</p> <p>CalSAWS will create an additional text message when a customer has been auto-renewed for Medi-Cal. This SCR is scheduled for release 23.09.</p> <p><b>Note:</b> The text messages will only be sent if the customer has opted into text messaging.</p>	<p><b>Button:</b> CIT 0261-23 Fact Sheet Text Messaging</p> <p><b>Button:</b> CIT 0261-23 MC RE Text Messages</p> <p><b>Button:</b> CIT 0261-23 Medi-Cal Renewal Text Messaging and Fact Sheet</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Continuous Coverage Unwinding-related Topics</p>

## 2. Edited UCs

Below is a table containing all edited Use Cases in Release 11. Text highlighted signals edits:

Program	Question/Title	Answer	Buttons
N/A	Welcome Message	<p>Hi! I'm the CalSAWS Virtual Assistant.</p> <p>I can help answer questions you may have about CalSAWS functionality.</p> <p>You can select an option below, type your question, or hover over the purple</p>	<p><b>Button:</b> CalWORKs</p> <p><b>Button:</b> CalFresh</p> <p><b>Button:</b> Medi-Cal</p> <p><b>Button:</b> Welfare-to-Work</p> <p><b>Button:</b> General Relief / General Assistance</p>

		<p>help icon for additional support.</p> <p>Do not respond with any personally identifiable information (PII) (e.g., date of birth, Social Security number).</p>	<p><b>Button:</b> Foster Care / AAP / Kin-GAP</p> <p><b>Button:</b> Give Feedback</p> <p><b>Button:</b> All Questions Library</p>
CalWORKs, CalFresh, Medi-Cal, Sar 7 Sub-Menu	Infographic for PR/RE/Reports	For information and instructions on periodic reports / SAR 7 and reevaluations (recertifications / redeterminations / renewals), click the button below.	<p><b>Button:</b> CIT 0119-23 Infographic – Periodic Reporting and Re-Evaluation</p> <p><b>Button:</b> Recertification Process</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More SAR 7-related Topics</p>
Give Feedback	Give Feedback Survey	<p><b>Good Response:</b></p> 	

		<p><b>Negative/Avg Response:</b></p>  <p>Prompt the users to give more details if the character count is under 20. For reference, a character count of 20 would be: <i>this is 20 characters</i></p>	
<p>CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief/ General Assistance, Foster Care / AAP / Kin-GAP, Discontinuances Sub-Menu, Intake Sub-Menu</p>	<p>Rescind Case</p>	<p>If you need to undo a denial or discontinuance of a person and/or program, without logging a new application, then you use the <b>Rescind</b> button on the <b>&lt;Program&gt; Detail</b> page to complete the process.</p> <p>The <b>Rescind</b> button can only rescind a group of</p>	<p><b>Button:</b> Reapplications and Rescissions (JA)</p> <p><b>Button:</b> Rescind vs Reapply</p> <p><b>Button:</b> More Discontinuances-related Topics</p>

		<p>people that share the same event effective date and event type (Denial or Discontinuance) and will not display when there is a pending application for ANY persons in the future.</p> <p>The <b>Rescind</b> button is available based on the view date of denial/discontinuance for all EDBC programs except General Assistance/General Relief. When clicking the Rescind button, the BDA and application date are automatically populated based on the last valid application. <del>If it is necessary to rescind two different groups of people, the process below will need to be repeated for each group. Start with the earliest effective date.</del></p> <p>To rescind a <del>denied/closed</del> program: <del>ease</del>, start by accessing the <b>&lt;Program&gt; Detail</b> page. To get to the <b>&lt;Program&gt; Detail</b> page</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Case Summary</b> from the <b>Local</b> navigation bar</li> <li>3. On the <b>Case Summary</b> page: <ol style="list-style-type: none"> <li>a. Change the <b>&lt;Display Date&gt;</b> to the month in which you want to rescind</li> <li>b. Click the <b>View</b> button to refresh the page with the new display date</li> </ol> </li> </ol>	<p><b>Button:</b> More Intake-related Topics</p> <p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
--	--	--	---

		<p>c. Click the <b>View Details</b> button in the <b>&lt;Program&gt;</b> block</p> <p>4. On the <b>&lt;Program&gt; Detail</b> page:</p> <p>a. Click the <b>Edit</b> button</p> <p>b. Click the <b>Rescind</b> button</p> <p>5. On the <b>Rescind Detail</b> page:</p> <p>a. Select a <b>&lt;Rescind Reason&gt;</b> from the drop list</p> <p>b. Confirm the <b>Comply Date</b> field when displayed in the <b>Section Effective Date to Rescind</b> page section, select the radio button next to the date you wish to rescind</p> <p>c. Click the <b>Save and Return</b> button</p> <p>6. On the <b>&lt;Program&gt; Detail</b> page:</p> <p>a. Click the <b>Save and Return</b> button</p> <p>Click the button below for a complete set of instructions on how to rescind a case.</p>	
<p>Penalties Sub-Menu, <b>Students Sub-Menu</b></p>	<p>Add/Remove Chronic Truant Penalty</p>	<p>To set up a chronic truant penalty, you must update the school attendance page with the attendance status for the teen. To edit a school attendance record:</p> <p>1. Access the <b>School Attendance List</b> page</p> <p>2. On the <b>School Attendance List</b> page, click the <b>Edit</b> button for the appropriate record</p> <p>3. On the <b>School Attendance Detail</b> page:</p> <p>a. Select an <b>&lt;Option&gt;</b> from the <b>New Change Reason</b> drop down list</p>	<p><b>Button:</b> School Attendance Information - Add and Edit (JA)</p> <p><b>Button:</b> More Student-related Topics</p> <p><b>Button:</b> More Penalty-related Topics</p>

		<p>Note: Refer to the Change Reason job aid for information on this section</p> <ul style="list-style-type: none"> <li>b. Enter the <b>&lt;Date&gt;</b> in the <b>New Reported Date</b> text box</li> <li>c. Enter appropriate information</li> <li>d. Click the <b>Edit</b> or <b>Add</b> button</li> </ul> <p>4. On the <b>School Attendance Status Detail</b> page, enter the appropriate information and click the <b>Save and Return</b> button</p> <p>5. On the <b>School Attendance Detail</b> page, click the <b>Save and Return</b> button</p> <p><b>Note:</b> To remove/end the penalty, go into School Attendance Detail screen and add a new attendance record.</p>	
<p>Foster Care / AAP / Kin-GAP, Income Sub-Menu</p>	<p>Foster Care Income and Property (Month of Petition)</p>	<p>Once a Foster Care Income and Property Detail record is saved, the System automatically populates the Net countable income in the month of petition / voluntary placement agreement and Net countable property in the month of petition / voluntary placement agreement fields. These are the income and property amounts used in determining eligibility. To access the Foster Care Income and Property Detail page:</p>	<p><b>Button:</b> Foster Care Income and Property Detail Page (JA)</p> <p><b>Button:</b> More Foster Care-related Topics</p> <p><b>Button:</b> More Income-related Topics</p>

		<ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>Foster Care</b> link on the <b>Task</b> navigation bar</li> <li>4. Click the <b>Placement Authority</b> link on the <b>Task</b> navigation bar to access the <b>Placement Authority List</b> page</li> <li>5. Select <b>&lt;Type&gt;</b> from the <b>Placement Authority Type</b> drop list</li> <li>6. Click the <b>Type</b> hyperlink, the <b>Add</b> button, or the <b>Edit</b> button to access the <b>Child Welfare Services Authority Detail, Probation Authority Detail, or Voluntary Placement Authority Detail</b> page(s) in View, Add, or Edit mode, respectively</li> <li>7. Click the <b>FC Income/Property Calculation</b> button to access the <b>Foster Care Income and Property Detail</b> page</li> </ol> <p><b>Note:</b> For instructions on how to add a Foster Care income record, a stepparent income record, a deduction record, or a property record, click the button below.</p>	
<p><b>Individual Demographics Sub-Menu</b>, CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief/ General</p>	<p>Update Individual Demographics</p>	<p>You may update an individual's demographics by accessing the Individual Demographics Detail page.</p> <p>To access the Individual Demographics Detail page</p>	<p><b>Button:</b> Individual Demographics Detail (OLH)</p> <p><b>Button:</b> More Individual Demographics-related Topics</p>

<p>Assistance, Foster Care / AAP / Kin-GAP</p>		<p>within the context of a case:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> <li>3. Click the <b>Individual Demographics</b> link in the <b>Task</b> navigation bar to access the <b>Individual Demographics List</b> page</li> <li>4. Click the <b>Name</b> hyperlink or <b>Edit</b> button to access the <b>Individual Demographics Detail</b> page in View or Edit mode, respectively</li> </ol>	<p><b>Button:</b> More CalWORKs-related Topics</p> <p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
<p>Printing Sub-Menu, Imaging Sub-Menu</p>	<p>Print to Imaging</p>	<p>Hyland Virtual Printer allows you to print documents directly to the Imaging Solution without physically printing or scanning the document.</p> <p>To use the Virtual Printer, follow the steps below. These steps assume you are logged into CalSAWS and are currently viewing the document to upload:</p> <ol style="list-style-type: none"> <li>1. In the document application, print the document as if you are physically printing it</li> <li>2. Select <b>Hyland Virtual Printer</b> from the list in the <b>Printing</b> dialog box. If</li> </ol>	<p><b>Button:</b> Imaging Single Case Scanning and Virtual Printing (JA)</p> <p><b>Button:</b> More Imaging-related Topics</p> <p><b>Button:</b> More Printing-related Topics</p>

		<p>Hyland Virtual Printer is not listed, please verify you have it installed on your workstation</p> <ol style="list-style-type: none"> <li>3. Click the <b>Print</b> button</li> <li>4. The Imaging Solution opens in a new window</li> <li>5. Adjust values on the <b>Capture &amp; Indexing</b> window as needed then click <b>Start</b></li> <li>6. The document will be uploaded. Click the <b>Open Batch</b> button when it turns dark blue</li> <li>7. The <b>QA &amp; Indexing</b> window will open with the document. QA as normal and submit the document</li> </ol> <p><b>Note:</b> If a task does not need to be created after printing, change <b>Task Override</b> to <b>True</b>.</p>	
<p>Printing Sub-Menu, Imaging Sub-Menu</p>	<p>Print from Imaging</p>	<p>To print an image from the imaging solution:</p> <ol style="list-style-type: none"> <li>1. Open the image</li> <li>2. On the top bar, find the printer icon to print the image</li> </ol> <p><b>Note:</b> If you do not see a printer icon, you do not have the appropriate security right to access that workflow queue and should follow your chain of command for guidance.</p>	<p><b>Button:</b> More Imaging-related Topics</p> <p><b>Button:</b> More Printing-related Topics</p>
<p>CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work, General Relief/ General Assistance, Foster Care / AAP / Kin-GAP</p>	<p>Change Address</p>	<p>To change an address, navigate to the <b>Address Detail</b> page:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigation bar</li> </ol>	<p><b>Button:</b> Contact Summary (OLH)</p> <p><b>Button:</b> Address Detail (OLH)</p> <p><b>Button:</b> More CalWORKs-related Topics</p>

		<p>3. On the <b>Contact Summary</b> page, to add a new address click the <b>Add</b> button</p> <p>4. To edit an address, click the <b>Person</b> hyperlink, or click the <b>Edit</b> button to access the <b>Address Detail</b> page</p> <p><b>Note:</b> Follow your county policy when adding or editing an address.</p> <p>To update a participant's address, you must navigate to the Customer Detail page. To access this page:</p> <ol style="list-style-type: none"> <li>1. Place the cursor over <b>Eligibility</b> on the <b>Global</b> navigation bar</li> <li>2. Select <b>Customer Information</b> from the <b>Local</b> navigator</li> <li>3. Go to the <b>Contact Summary</b> page</li> <li>4. Click the <b>Add</b> button, the <b>Edit</b> button, or the <b>Person</b> hyperlink in the <b>Contact Information</b> page section to access the <b>Contact Detail</b> page in the relevant mode</li> </ol> <p><b>Note:</b> When correcting a customer's address, click the <b>Edit</b> button. When updating with a new address, click the <b>Add</b> button to preserve address history.</p>	<p><b>Button:</b> More CalFresh-related Topics</p> <p><b>Button:</b> More Medi-Cal-related Topics</p> <p><b>Button:</b> More Welfare-to-Work-related Topics</p> <p><b>Button:</b> More General Relief / General Assistance-related Topics</p> <p><b>Button:</b> More Foster Care / AAP / Kin-GAP-related Topics</p>
--	--	--	---

**3. New Keywords**

Below is a table containing all new Keywords in Release 11.

UC #	Title	Keywords
------	-------	----------

EB.06	Monthly Benefit Allotment / Issuance History	monthly benefit allotment, benefit allotment, allotment, allotments, calfresh allotment, benefit amount, monthly allotment, issuance history, history or issuances, past issuance, past issuances, issuant amount, issuance amounts, issuance amount, ebt history, view approved allotment
SR.05	Mark SAR 7 Incomplete	incomplete sar7, mark sar7 as incomplete, incorrect SAR7, incomplete sar, received incomplete sar
ED.07	Override Medi-Cal EDBC	override edbc, override medi-cal edbc, override mc
DC.01	Restoration of Aid Waiver	restore aid, restoration of aid, restore previously aided person, restore, restoration, restoring aid, restore a person, restore person, restoration of person, restore aid waiver, aid waiver, restoration aid waiver, restoration of aid waiver
WA.02	Caseloads Infographic	managing caseloads, viewing caseloads, no closed caseloads, caseload types
WA.03	Workload Inventory Page Icons	workload inventory icons, workload inventory page, workload icons, inventory icons
ST.02	Trigger Student Exemption	process a student exemption, student exempt, student exemption, add student exemption, edit student exemption, view student exemption, meet exemption for school
ST.03	Work Study	work study, add work study, work study eligibility, update work study, student job, college job, student money, money for student
NT.02	Add New Program to Case	how to add program to existing case, add medi-cal to calfresh, add program to case
NT.03	Denied Case – Failure to Complete Interview (CalFresh)	deny missed interview case, how to deny a case for missed interview, deny case missed interview, missed interview deny case, failure to complete interview, how to deny case failure to complete interview, missed interview, NOMI

ID.02	DP Indicator	dp indicator, dangerous person, dp, indicate dp, indicate dangerous person
PT.00	Printing Sub-Menu	how to print, print docs, print images, print screen, print a page, print, print sof, print statement of facts, print saws 2 plus, print an noa, print documents, print doc, printing, print locally, print centrally, print a form, print a receipt, print referral, print for case record, print appointment letter, print workload inventory, cancel print, cancel pending print, add ebt printer
CF.55	Add Case Payee	case payee, add case payee, payee on case, add payee to case, case payees, change case payee, update case payee, update payee, change payee, payee, payees, update payee
CF.56	Update Address	update address, how to update an address, how to update address, update my address, update an address, address update, address updates, make updates to address, correct address, change address, address change, how to correct address, how to change address, change an address, mailing address, mail address, shipping address, update mailing address, change mailing address, correct mailing address, make updates to mailing address,
MC.10	Order Birth Match	birth match, order birth match, how to order birth match, vital statistics match, vital statistics, vital match, vital birth match, add birth match, birth match, birthmatch, birth mach, vital stats
FR.05	EBT Sub-Menu	search by ebt number, ebt number search
FR.06	IEVS Sub-Menu	npm, npm abstract
FR.07	IATs Sub-Menu	When am I able to take a medical case that has a refferal from Calheers?
FR.09	Penalties Sub-Menu	remove penalty, remove penalties

FR.12	Imaging Sub-Menu	H perceptive, see images, hyland perceptive,
FR.14	Self-Service Portal Sub-Menu	benefitscal, benefits cal, Benefits Cal, BenefitsCal, send message, send messages, clear message
FR.22	Income Sub-Menu	earnings of a child, children earnings, input earnings
FR.19	Client Correspondence Sub-Menu	print noa, print forms, print notice, print notice of action, print noas, print form, print eligibility letter
FR.17	Task Management Sub-Menu	task index, scan task, task assignment, task reassignment, assign task, assign tasks
FR.28	CIT Logging into CalSAWS	how to log in, logging in question
FR.35	Reset CalSAWS Password	Password expiring
FR.24	EDBC Sub-Menu	auxiliary Authorization list, i need to reach Auxiliary authorization list, EDBC read only
FR.37	Discontinuances Sub-Menu	reopen a closed program, reopen closed program, how to reopen a closed program, reopen denied program, reopen program, open program, open closed program, negative, I need assistance completing negative action on a case, how do i complete negative action on a pending case
FR.39	Workload/Case Assignment Sub-Menu	case assignment
NT.00	Intake Sub-Menu	rescind vs reapply, rescind v reapply, difference between rescind and reapply , how to create an application
ID.00	Individual Demographics Sub-Menu	individual demographics page, change language, marital status, marriage status, voter registrations, voter reg, update gender, gender identity, print forms in another language, change language, add spoken language, spoken language, adding a language, adding a new language, add a written language, change a language for customer, add ethnic codes, update ethnicity
CF.40	Identify Duplicate Person in CalSAWS	merge CIN numbers, how do i merge cin numbers, duplicate records, duplicate persons, duplicate CINs

CF.41	Update Living Arrangement	where to mark as homeless, mark someone as homeless, mark homeless, update homeless status
CF.43	Add Expense	add an expense
CF.52	Change Address	update address, how to update an address, how to update address, update my address, update an address, address update, address updates, make updates to address, correct address, change address, address change, how to correct address, how to change address, change an address, mailing address, mail address, shipping address, update mailing address, change mailing address, correct mailing address, make updates to mailing address,
CF.54	Add Journal Entry	add case comments, add case comment, case comments, case comment, access case comments, access case comment, reminder, comment on case, comment on a case
MC.07	Add Retroactive Medi-Cal Month	retro active benefits, retroactive medical
MC.08	Long Term Care (LTC)	long term update, update a ltc
MC.03	Request Reprint of 1095-B	1095B
WW.01	Send OCAT Referrals	send an ocat, send an ocat referral, send ocat referrals
WW.02	View OCAT Referrals	send an ocat, send an ocat referral, send ocat referrals
GR.01	Request Lodging Invoice	vouchers
FC.06	Foster Care Income and Property (Month of Petition)	stepparent income record, add stepparent income record, deduction record, property record, foster care income record

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

Release 11 will include 2 new sub-menu branches that will bucket keywords into a sub-menu.

The new sub-menu branches are:

- Individual Demographics
- Printing

#### 5. UX/UI Updates

There are 2 UX/UI updates in this release.

1. New Chat Icon in VA (see *fig. 2.1*)
2. Tool Tip Updates Include:
  - a. A purple help icon with a hover feature. When users hover over the icon, a help message appears. (See Help message in part 'b')
  - b. A help message that users hover over when they cannot find an answer to their question. (see *fig. 2.2*)

#### **2.1.4 Page Location**

N/A

#### **2.1.5 Security Updates**

N/A

#### **2.1.6 Page Mapping**

N/A

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Design	Release Tracker	VirtualAssistant_Release11Tracker.xlsx
2	Design	Miro Board – VA flow and use cases are documents	R11 - CalSAWS Worker-Facing VA.pdf

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

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

## **5 OUTREACH**

---

N/A

## **6 APPENDIX**

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-253667

Task Mgmt Configurable Task Categories

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Vallari Bathala
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
04/10/2023	1.0	Initial Revision	Vallari Bathala

## Table of Contents

1	Overview .....	5
	1.1 Current Design.....	5
	1.2 Requests.....	5
	1.3 Overview of Recommendations.....	5
	1.4 Assumptions .....	5
2	Recommendations.....	6
	2.1 Task Category List Page.....	6
	2.1.1 Overview .....	6
	2.1.2 Task Category List Page Mockup .....	7
	2.1.3 Description of Changes .....	9
	2.1.4 Page Validations .....	10
	2.1.5 Page Location .....	10
	2.1.6 Security Updates.....	10
	2.1.7 Page Mapping.....	11
	2.1.8 Page Usage/Data Volume Impacts .....	11
	2.2 Task Category Detail Page.....	11
	2.2.1 Overview .....	11
	2.2.2 Task Category Detail Mockup .....	11
	2.2.3 Description of Changes .....	13
	2.2.4 Page Validations .....	15
	2.2.5 Page Location .....	15
	2.2.6 Security Updates.....	15
	2.2.7 Page Mapping.....	16
	2.2.8 Page Usage/Data Volume Impacts .....	16
	2.3 Additional Page Modifications .....	16
	2.3.1 Overview .....	16
	2.3.2 Description of Changes .....	17
	2.4 Data Change/Load – Task Categories .....	17
	2.4.1 Overview .....	17
	2.4.2 Description of Change.....	17
	2.4.3 Estimated Number of Records Impacted/Performance.....	17
3	Supporting Documents .....	18

3.1	Task Upload Templates .....	18
4	Requirements .....	19
5	Migration Impacts .....	20
6	Outreach.....	21
7	Appendix.....	22

# 1 OVERVIEW

---

This design describes the details for allowing Users to create and configure County specific Task Categories.

## 1.1 Current Design

The CalSAWS System allows counties to create custom Task Types via the Task Type pages. A required attribute for a Task Type is a Task Category. Task Categories can be associated to Task Banks and/or Positions to facilitate Get Next functionality and specific types of Task routing such as “Office Distribution” assignment.

The CalSAWS System includes a static set of Task Categories that are common to all counties; Task Categories are not county customizable.

## 1.2 Requests

1. Implement functionality that allows counties to configure custom Task Categories.

## 1.3 Overview of Recommendations

1. Create a Task Category List and Detail page to facilitate custom Task Categories by county.
2. Update online pages and processing logic within CalSAWS that is reliant on Task Categories to be based on the county custom Task Categories instead of the existing static Task Categories.

## 1.4 Assumptions

1. SCR CA- 253606 will implement the necessary changes to reporting for county specific Task Categories.

## 2 RECOMMENDATIONS

---

### 2.1 Task Category List Page

#### 2.1.1 Overview

The Task Category List page will capture and display information for Task Categories available to the viewing county.

## 2.1.2 Task Category List Page Mockup

<b>Admin</b>
Flag
County Announcement
County Authorizations
County Benefit Issuance Thresholds
County Security Roles
Disaster Services
<b>▼ Automated Actions</b>
Document Routing
MEDS Alert Admin
Task Admin
Audit
Non-County Staff
Correspondence
Campaign
Emergency Text
<b>▼ Tasks</b>
Task Settings
Task Categories
Task Types
Task Reassignment
Task Upload
Referral Assignments
<b>▼ GA/GR County Admin</b>
Rules
Fiscal
Grants/Income
Appointment
Correspondence
Non- Compliance/Sanction

Figure 2.1.2-1 – Task Category List Page Navigation Mockup

## Task Category List

▼ Refine Your Search Search

Name:

Results per Page: 25 Search

---

**Search Results Summary** Results 1 - 25 of 46

1 2 Next

[Add Task Category](#)

Name	Description	
<input type="checkbox"/> <a href="#">Category 1</a>	Description for Category 1 that can be added in the Task Category Detail page.	<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Category 2</a>	Description for Category 2 that can be added in the Task Category Detail page.	<a href="#">Edit</a>
<a href="#">AAP Worker</a>		
<a href="#">Application Registration</a>		
<a href="#">Auxiliary Issuance</a>		
<input type="checkbox"/> <a href="#">Batch EDBC</a>		<a href="#">Edit</a>
<a href="#">CMIPSI</a>		
<a href="#">CSC</a>		
<input type="checkbox"/> <a href="#">CWS</a>		<a href="#">Edit</a>
<a href="#">CalHEERS</a>		
<input type="checkbox"/> <a href="#">Case Update</a>		<a href="#">Edit</a>
<a href="#">...</a>		
<input type="checkbox"/> <a href="#">Foster Care RDB</a>		<a href="#">Edit</a>
<input type="checkbox"/> <a href="#">Fraud</a>		<a href="#">Edit</a>
<a href="#">IEVS</a>		
<a href="#">IEVS Criminal</a>		
<a href="#">IEVS Priority</a>		
<a href="#">Intake</a>		
<a href="#">Interest Allocation</a>		
<a href="#">Invoice</a>		
<a href="#">Issuance Method</a>		

[Remove](#) [Add Task Category](#)

1 2 Next

Figure 2.1.2-2 – Task Category List Page Mockup

### 2.1.3 Description of Changes

Add a Task Category List page to the CalSAWS System that is accessible through a new "Task Categories" Task Navigation hyperlink. (See Figure 2.1.2-1 for the placement of the task navigation link and reference [Section 2.1.5](#) for the full page navigation.)

The "Task Categories" hyperlink will display if the User's security profile includes the "TaskCategoryDetailView" security right.

Add a Task Category List page to the CalSAWS System.

#### 1. Search Section

This is the upper section of the page that displays as a collapsible panel with search criteria.

- a. Name - A text field that allows a user to search by a Task Category name. The maximum length for this field is 30 characters.
2. **BUTTON:** Search – This button will refresh the information on the list page based on the search parameter values. If this button is clicked without filling in any parameters, all records will display. If this button is clicked and no records satisfy the search criteria, a "No Data Found" message displays in the Search Results Summary Section.

#### 3. Search Results Summary Section

This section will be displayed when there is at least one Task Category record found. The results will be paginated with 25 results per page. When the page initially loads, all Task Categories available for the county will display. Results in this panel will be ordered alphabetically by Name. The Name and Description columns are sortable.

- a. **BUTTON:** Add Task Category – This button will navigate to the Task Category Detail page in create mode. The button will display if the worker's security profile contains the "TaskCategoryDetailEdit" security right. This button will display above and below the results panel.
- b. Selectable checkbox – For each result displayed, a selectable checkbox may or may not display at the beginning of the row. A checkbox will not display for Task Categories that cannot be removed.
- c. **BUTTON:** Edit – This button will navigate to the Task Category Detail page in Edit mode for the Task Category. The button will display if the worker's security profile contains the "TaskCategoryDetailEdit" security right.
- d. **BUTTON:** Remove – This button will remove any Task Categories that have been selected via the Selectable Checkbox. (See Selectable checkbox field above in 3b). This button will display if

the worker's security profile contains the "TaskCategoryDetailEdit" security right.

#### 2.1.4 Page Validations

1. "Remove – One of the selections for removal is currently configured to a Position, Bank, Task Type, Task Reassignment or QA/QC Task Sample."
  - a. Pressing the Remove button while selecting a Task Category that has been configured for a Position, Bank, Task Type, Task Reassignment or QA/QC Task Sample. will display a validation message.

#### 2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Categories

The Task Navigation will display if the user profile contains the "TaskCategoryListView" security right.

#### 2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskCategoryListView	Task Category List	<ul style="list-style-type: none"> <li>• Task Category View</li> <li>• Task Category Edit</li> </ul>

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Category View	View Task Category List and Task Category Detail information.	• View Only
Task Category Edit	View Task Category List and Task Category Detail information. Edit and	N/A

Security Group	Group Description	Group to Role Mapping
	save Task Category information.	

### 2.1.7 Page Mapping

Add page mapping for the Task Category List page.

### 2.1.8 Page Usage/Data Volume Impacts

N/A

## 2.2 Task Category Detail Page

### 2.2.1 Overview

This section describes the functionality for a new Task Category Detail page.

### 2.2.2 Task Category Detail Mockup

#### Task Category Detail

\*- Indicates required fields

Save and Return
Cancel

**Task Category Information**

**Name: \***

**Description:**

Description for Task Category Name that is 40 Characters Long that can be added in the Task Category Detail page.

Save and Return
Cancel

Figure 2.2.2-1 – Task Category Detail – Create

### Task Category Detail

\*- Indicates required fields Edit Close

#### Task Category Information

**Name: \***  
Task Category Name that is 40 Characters Long

**Description:**  
Description for Task Category Name that is 40 Characters Long that can be added in the Task Category Detail page.

#### Associations

Positions(s): 0	Banks(s): 0	Task Type(s): 0
Task Reassignment(s): 0	QA/QC Task Sample(s): 0	

Edit Close

Figure 2.2.2-2 – Task Category Detail – View without Associations

### Task Category Detail

\*- Indicates required fields Edit Close

#### Task Category Information

**Name: \***  
Task Category Name that is 40 Characters Long

**Description:**  
Description for Task Category Name that is 40 Characters Long that can be added in the Task Category Detail page.

#### Associations

Positions(s): 23	Banks(s): 100	Task Type(s): 0
Task Reassignment(s): 20	QA/QC Task Sample(s): 0	

Edit Close

Figure 2.2.2-3 – Task Category Detail – View with Associations

### Task Category Detail

\*- Indicates required fields

Save and Return Cancel

#### Task Category Information

**Name: \***

**Description:**

#### Associations

Positions(s): 0	Banks(s): 0	Task Type(s): 0
Task Reassignment(s): 0	QA/QC Task Sample(s): 0	

Save and Return Cancel

Figure 2.2.2-4 – Task Category Detail – Edit without Associations

### Task Category Detail

\*- Indicates required fields

Save and Return Cancel

#### Task Category Information

**Name: \***  
 Task Category Name that is 40 Characters Long

**Description:**

#### Associations

Positions(s): 23	Banks(s): 100	Task Type(s): 0
Task Reassignment(s): 20	QA/QC Task Sample(s): 0	

Save and Return Cancel

Figure 2.2.2-5 – Task Category Detail – Edit with Associations

### 2.2.3 Description of Changes

Add a Task Category Detail page to the CalSAWS System.

1. **BUTTON:** Edit - This button displays when the page is in view mode and will refresh the Task Category Detail page in Edit mode. The button will

display if the worker's security profile contains the "TaskCategoryDetailEdit" security right.

2. **BUTTON:** Close - This button displays when the page is in View mode and will navigate to the Task Category List page.
3. **BUTTON:** Save and Return - This button displays when the page is in Create or Edit mode. The button will save page changes and navigate to the Task Category List page. The button will display if the worker's security profile contains the "TaskCategoryDetailEdit" security right.
4. **BUTTON:** Cancel - This button displays when the page is in Create or Edit mode. The button will discard page changes and navigate to the Task Category List page.

## 5. Task Category Information Section

This is the upper section of the page that displays general Task Category attributes.

- a. Name (**Required**) – A text field that allows a user to specify the name of the Task Category. The maximum length for this field is 40 characters. When the page is in Edit mode, this field will ONLY be editable if the Task Category has not been associated to something (See Associations below).
- b. Description - A text field that allows a user to input up to 2000 characters of information to serve as a description for the particular Task Category.
- c. Associations

This section of the page displays association information for the Task Category. This section will only display when the page is in View or Edit mode. This section will not display when the page is in Create mode.

- i. The following attributes are included in this panel:

1. Position(s)

- a. If the Category is associated to one or more Position(s) via the Position Detail page, display the number of Positions the Category is associated to.
- b. If the Category is not associated to one or more Position(s) via the Position Detail page, display '0'.

2. Banks(s)

- a. If the Category is associated to one or more Task Bank(s) via the Bank Detail page, display the number of Banks the Category is associated to.
- b. If the Category is not associated to one or more Task Bank(s) via the Bank Detail page, display '0'.

3. Task Type(s)

- a. If the Category is associated to one or more Task Type(s) via the Task Type Detail page, display the number of Task Types the Category is associated to.
  - b. If the Category is not associated to one or more Task Type(s) via the Task Type Detail page, display '0'.
- 4. Task Reassignment(s)
  - a. If the Category is associated to one or more Task Reassignment(s) via the Task Reassignment Detail page, display the number of Task Reassignments the Category is associated to.
  - b. If the Category is not associated to one or more Task Reassignments via the Task Reassignment Detail page, display '0'.
- 5. QA/QC Task Sample(s)
  - a. If the Category is associated to one or more QA/QC Task Sample(s) via the QA/QC Task Sample Detail page, display the number of QA/QC Task Samples the Category is associated to.
  - b. If the Category is not associated to one or more QA/QC Task Sample(s) via the QA/QC Task Sample Detail page, display '0'.

## 2.2.4 Page Validations

1. "Name - A Task Category with this name already exists."
  - a. Add a validation if the User attempts to save the page when a Task Category already exists for the county with the same name.

## 2.2.5 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A
- The Task Navigation will display if the user profile contains the "TaskCategoryDetailView" security right.

## 2.2.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TaskCategoryDetailView	Task Category Detail;	<ul style="list-style-type: none"> <li>• Task Category View</li> <li>• Task Category Edit</li> </ul>
TaskCategoryDetailEdit	Task Category Detail;	<ul style="list-style-type: none"> <li>• Task Category Edit</li> </ul>

## 2. Security Groups

Security Group	Group Description	Group to Role Mapping
Task Category View	View Task Category List and Task Category Detail information	<ul style="list-style-type: none"> <li>• View Only</li> </ul>
Task Category Edit	View Task Category List and Task Category Detail information. Edit, save and remove Task Category information.	N/A

### 2.2.7 Page Mapping

Add page mapping for the Task Category Detail page.

### 2.2.8 Page Usage/Data Volume Impacts

N/A

## 2.3 Additional Page Modifications

### 2.3.1 Overview

This section outlines additional modification to CalSAWS pages required to make the new county specific Task Categories available to all pages currently displaying or utilizing the Task Category attribute.

### **2.3.2 Description of Changes**

1. Modify the Task panel of the Position Detail page to include Task Categories that are available to the county as seen on the Task Category List page.
2. Modify the Task panel of the Bank Detail page to include Task Categories that are available to the county as seen on the Task Category List page.
3. Modify the dropdowns/display values referenced in the Appendix in [Section 7](#) to include county specific Task Categories.

## **2.4 Data Change/Load – Task Categories**

### **2.4.1 Overview**

This section describes the specifics of a Task Category data change to perform an initial load of Task Categories into the county configurable framework.

### **2.4.2 Description of Change**

1. All existing Task Categories within CalSAWS will be initially loaded into the county configurable Task Category framework for each county. Reference the Appendix in [Section 7](#) for a listing of Task Categories indicating which Task Categories are considered “System” Task Categories that cannot be edited or removed.
2. Data which references the existing static Task Categories will be updated to reference the Task Category as loaded into the county configurable framework as described in Step 1.

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

Approximately 2,400 initial rows to be loaded.

### 3 SUPPORTING DOCUMENTS

---

#### 3.1 Task Upload Templates

Number	Functional Area	Description	Attachment
1	Online	Security Matrix	 CA-253667 Security Matrix.xlsx

## 4 REQUIREMENTS

---

N/A

## 5 MIGRATION IMPACTS

---

N/A

## 6 OUTREACH

---

N/A

## 7 APPENDIX

1. This section outlines additional CalSAWS System pages where county configurable Task Categories will be available.

Page(s)	Field(s)
Task Type List Page	Category dropdown located in the Search panel.
Task Type Detail Page	Category dropdown in the Task Type Information panel.
Task Reassignment Detail Page	Task Category dropdown in the Task Types panel.
QA/QC Task Sample Detail Page	Task Category dropdown in the Task Types panel.
Task Pop-Up: Task Detail Page	Category dropdown.
Task Pop-Up: Task Search Page	Category dropdown in the Search panel.
Task Pop-Up: My Tasks Page	Category column in the results section.
Task Pop-Up: My Tasks Export	Category column.
Task Pop-Up: My Watchlist Page	Category column in the results section.
Task Pop-Up: Task Search Page	Category column in the results section.
Task Pop-Up: Task Search Page Export	Category column.
Task Pop-Up: My Tasks Page	Get Next Category dropdown.
Position Detail Page	The Tasks panel.
Bank Detail Page	The Task Categories panel.
Worklist Page	Category dropdown in the Search panel and Get Next panel.
Worklist: Task Detail Page	Category dropdown.
Worklist PR/RE Page	Category dropdown in the Get Next panel.

2. This section outlines additional CalSAWS System pages where county configurable Task Categories will be available.

<b>Task Category</b>	<b>Editable (Y/N)</b>
Application Registration	No
Auxiliary Issuance	No
Batch EDBC	Yes
CalHEERS	No
Case Update	Yes
CMIPSII	No
Computation Request	No
CSC	No
CWS	Yes
e-Application	No
e-ICT	No
EBT	No
EDBC	No
External Agency Admin	No
External Recovery Account	No
Foster Care RDB	Yes
Fraud	Yes
IEVS	No

IEVS Criminal	No
IEVS Priority	No
Interest Allocation	No
Invoice	No
Issuance Method	No
Issuance Replacement/Reissue	No
Legacy	Yes
Manual	Yes
MC 355	Yes
MEDS Alert	Yes
MEDS Liaison	Yes
Payment Request	No
QR7LA	Yes
Quality Assurance Assignment	Yes
Quality Review	No
Redetermination	Yes
SAR7	Yes
Screening Packet	Yes
Self Service Portal Communications	No
Time Limits	Yes

Transaction Refund	No
Valuable	No
VITA	No