CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232609

ACL 21-131 Restart TNB Recertifications

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ganesh Pinisetti
	Reviewed By	Ramakrishna Kuchibhotla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/28/2022	0.1	Initial Draft	Ganesh Pinisetti
11/03/2022	0.2	Modified 2.1 and 2.2 sections based on review comments	Ganesh Pinisetti
3/1/2023	0.3	Updated and added EDBC changes	Paul Galloway
4/6/2023	0.4	Updated with design team review	Paul Galloway
4/11/2023	0.5	Updated with streamlined DCR solution	Paul Galloway
8/9/2023	0.6	Content Revision to update Case Details API to send RE status for TNB4 to BenefitsCal	Jennifer Muna

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1 OVERVIEW

Restart the Transitional Nutrition Benefit (TNB) program with 12-month long recertification periods beginning with recertification reports due in November 2023.

1.1 Current Design

Per ACL 18-92 (CA-205328), households eligible for the TNB Program were initially certified for one 12-month period. Eligible households were then recertified for additional six-month periods. Households that lost TNB eligibility for failure to provide documentation could restore without proration back to the original date of discontinuance if all documentation was provided within 30 days of the discontinuance.

Per ACL 21-131, recertification requirements for the TNB program were suspended for two years beginning November 2021. "TNB 4 Recertification Packet" (PB00R502), "Transitional Recertification Reminder Notice TNB 5" (PB00R503), and "TNB Recertification Discontinuance Batch EDBC Sweep" (PB00E911) batch jobs were turned off to suspend the TNB program recertification process.

Fiscal skip issuance logic was turned off so issuances would not be skipped due to non-completed TNB recertifications.

1.2 Requests

Per ACL 21-131, restart TNB recertifications beginning with those due in November 2023 and make new recertification periods 12 months long and increase the TNB restoration period to 90 days.

1.3 Overview of Recommendations

1. Update the recertification period set by EDBC for TNB programs from six months to twelve months when the new recertification period begins December 2023 or later.
2. Perform a one-time data change to update the Due Date on the latest non-completed NB Program Re-Evaluation History (RE) record on all Active TNB programs where the RE Due Date is earlier than 11/30/2023. The new Due Date will be calculated by internally adding six months at a time to the existing Due Date until the result is 11/30/2023 or later. A new RE record will be inserted if the TNB program has no RE record, or no RE record with a null Completion Date. A Completion Date will be set on RE records that are not the most recent one and were never marked complete.
3. Restart paused batch jobs in time for recertifications to resume beginning with those due in November 2023.
4. Restart paused fiscal skipped issuance logic for TNB Recertifications.
5. Add TNB4 form to the BenefitsCal RE Batch job and update the end date to display for the 90 day period.
6. Update Case Inquiry API to send information for TNB Recertification.

1.4 Assumptions

1. On the "Nutrition Benefit History" page (*accessed from Case Summary -> Nutrition Benefits/View Details -> View History*), the "Program Re-Evaluation History" section displays the "Begin Month" as "MM/YYYY". In the database it is stored as "MM/DD/YYYY" where DD is the first of the month.
   Similarly, "End Month" displays as "MM/YYYY", but in the database it is "MM/DD/YYYY" where DD is the last day of the month.

   Program Re-Evaluation History

Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason
06/2021	11/2021	TNB Non Reporting		

2. When this SCR refers to setting the Due Date to six months after the Begin Date, it is counting the month containing the Begin Date as the first of the six months.

3. CDSS confirmed that they do not expect CalSAWS to do a mass mailer to inform TNB households that we are resuming TNB Recertifications.

4. AB 135 increases the TNB restoration period to 90 days. The system does not restrict restoration periods, so this is managed by users.

5. Case Inquiry API sends case and program information to the Self-Service Portal. CA-263235 implemented an update to the Case Inquiry API to restrict case information and correspondence from being sent to the Self-Service Portal for cases associated to FC/AAP/KG aid code.

2 RECOMMENDATIONS

2.1 Eligibility: Update TNB Recert Period to 12 Months

2.1.1 Overview

TNB RE periods were previously six months. They will now be twelve months if they begin after November 2023.

2.1.2 Description of Changes

1. Update TNB logic to create twelve-month periods when creating new RE periods that begin after November 2023.

   Note: After this SCR is implemented, if TNB EDBC runs for November 2023 or earlier and establishes an RE period it should be six months long.

   Technical note: this is currently set by the **TNB_UPDATE_MONTHS_INCREMENT** value in **edbc\edbclist\AuthorizeReEvaluation.java**

2.1.3 Programs Impacted

TNB

2.1.4 Performance Impacts

None anticipated.

2.2 Eligibility DCR: Insert/Update TNB RE Records

2.2.1 Overview

Create and apply a Data Change Request (DCR) to update the Due Date on the latest non-completed RE record on all Active TNB programs where the RE Due Date is earlier than 11/30/2023. The new Due Date will be calculated by internally adding six months at a time to the existing Due Date until the result is 11/30/2023 or later, and then that result will be set as the new Due Date.

This process will also insert a new RE record if the TNB program has no RE record, or no RE with a null Completion Date. A Completion Date will be set on RE records that are not the most recent one and were never marked complete.

2.2.2 Description of Changes

1. For all programs meeting the following criteria:
   a. Program type is TNB
   b. Program status is Active at the time the DCR is applied
   c. Program does not have an RE record with a Due Date of 11/30/2023 or later

2. Make the following updates:
   a. For any RE that is not the most recent (by Begin Date) RE on that program and has a NULL Completion Date, set the Completion Date to the Due Date and the Completion Reason to Data Change (CT1892, Code DC).

   b. If the program does not have any RE record, insert an RE record where the Begin Date is the program Application Date, the Due Date is the last day of the sixth month from the Begin Date, and the Completion Date is null.

   c. If the latest RE record on a program does not have a null Completion Date, insert an RE record where the Begin Date is one day after the latest Completion Date on RE records for the program, the Due Date is the last day of the sixth month from the Begin Date, and the Completion Date is null.

   d. For all the programs that meet the criteria in item 1(*including those just updated in the previous steps if their Due Date is earlier than 11/30/2023*), update the Due Date on the latest RE as follows:
      i. Take the existing Due Date and calculate the last day of the month six months after that.

ii. If that calculated date is before 11/30/2023, repeat the process by calculating the last day of the month six months after that. Keep repeating that process until the calculated date is 11/30/2023 or later.
iii. Set the RE Due Date to the newly calculated date (which will be 11/30/2023 or later).

2.2.3 Examples:

1. Active TNB program has the latest RE Due Date of 11/30/2021.

Program Re-Evaluation History

Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason
06/2021	11/2021	TNB Non Reporting		
12/2020	05/2021	TNB Non Reporting	05/04/2021	Processed

Figure 2.2.3.1 – Program Re-Evaluation History before applying DCR

   a. Calculate 6 month intervals after the Due Date until the result is 11/30/2023 or later:
      5/31/2022, 11/30/2022, 5/31/2023, **11/30/2023**
   b. Set the latest RE Due Date to **11/30/2023**.

Program Re-Evaluation History

Begin Month	Due Month	Reporting Type	Completion Date	Completion Reason
06/2021	11/2023	TNB Non Reporting		
12/2020	05/2021	TNB Non Reporting	05/04/2021	Processed

Figure 2.2.3.2 – Program Re-Evaluation History after applying DCR

2. Active TNB program has the latest RE Due Date of 12/31/2021.
   a. Calculate 6 month intervals after the Due Date until the result is 11/30/2023 or later:
      6/30/2022, 12/31/2022, 6/30/2023, **12/31/2023**
   b. Set the latest RE Due Date to **12/31/2023**.

3. Active TNB program has the latest RE Due Date of 7/31/2023.
   a. Calculate 6 month intervals after the Due Date until the result is 11/30/2023 or later:
      1/31/2024
   b. Set the latest RE Due Date to **1/31/2024**.

2.2.4 Estimated Number of Records Impacted/Performance

There are approximately 1,550 active TNB programs in CalSAWS up through the migration of CalWIN Wave 2. When this DCR runs the volume will have increased somewhat as Waves 3 through 5 will have converted by then.

2.3 Correspondence: Enable Suspended Correspondence Jobs

2.3.1 Overview

Enable the following correspondence batch jobs (which were suspended by SCR CA-232840 and CA-232171) in time to restart TNB recertifications beginning with recertifications due in November 2023:

- **PB00R502** - **TNB 4 Recertification Packet** job runs on the 10th of every month (or next business day if 10th is a Sunday or holiday) to send TNB4 to households where the RE is due the following month.

- **PB00R503** - **Transitional Recertification Reminder Notice TNB 5** job runs on the 15th of every month (or next business day if 15th is a Sunday or holiday) to send TNB5 to households where the TNB RE is due in the current month and the most recent TNB4 packet is still in Sent status.

2.3.2 Description of Change

1. Update the batch execution schedule for PB00R502 prior to 10/10/2023 to resume the previous schedule.
   a. The Batch Schedule Change Request (BSCR) Start date will be 10/10/2023. This is the first date that the batch will run.
2. Update the batch execution schedule for PB00R503 prior to 11/15/2023 to resume the previous schedule.
   a. The Batch Schedule Change Request (BSCR) Start date will be 11/15/2023. This is the first date that the batch will run.

2.4 Batch: Enable Suspended Batch Job

2.4.1 Overview

Enable the following batch job (which was suspended by SCR CA-232840) in time to restart TNB recertifications beginning with November 2023 recertifications:

- **PB00E911** - **TNB Recertification Discontinuance Batch EDBC Sweep Job** runs on the last batch day of every month and triggers EDBC on TNB households active in the following month where the most recent non-completed recertification Due Date is the last day of the batch job month.

2.4.2 Description of Change

1. Update the batch execution schedule for PB00E911 prior to 11/30/2023 to resume the previous schedule.
2. The Batch Schedule Change Request (BSCR) Start date will be 11/30/2023. This is the first date that the batch will run.

2.4.3 Execution Frequency

Monthly on the last day of the month.

2.4.4 Key Scheduling Dependencies

Before Batch EDBC processing job.

2.4.5 Counties Impacted

All Counties.

2.4.6 Category

Core

2.4.7 Data Volume/Performance

N/A

2.4.8 Failure Procedure/Operational Instructions

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

2.5 Fiscal: Update TNB RE Skip Issuance Reporting Frequency

2.5.1 Overview

Update the "Periodic Report Frequency" used by Skip Issuance from 6 months to 12 months.

2.5.2 Description of Change

1. Apply a CTCR to change update the TNB Non Reporting "Periodic Report Frequency" (CT542, Code TN) from 6 months to 12 months.

2.6 Fiscal: Enable TNB Recertification Skip Issuance

2.6.1 Overview

Restart TNB Fiscal logic (which was suspended by CA-233686) that skips issuances on TNB households for the following reasons:

- Redetermination/Recertification Does not Exist for submit month
- Redetermination/Recertification received is not complete

This must be applied before TNB Payroll runs in November 2023. It can be applied any time after the DCR that is inserting/updating RE records has completed.

2.6.2 Description of Change

1. Execute a DCR to set the End Date to high date on the "Skip Issuance Redetermination Validation" scenarios for Nutrition Benefit in Fiscal Transact Map.

2.7 BenefitsCal: Enable TNB4 in the RE Batch Job.

2.7.1 Overview

Enable TNB4 Recertification the following batch job in time to restart TNB recertifications beginning with November 2023 recertifications:

- **PB00C3XX** (PB00C301 to PB00C350)

2.7.2 Description of Change

1. Update the batch job to include TNB4 Renewals.
2. Update the end date for TNB4 Renewals to 90 days.
3. DCR to include the TNB4 Renewal Form name.

2.7.3 Execution Frequency

Daily

2.7.4 Key Scheduling Dependencies

Existing batch job

2.7.5 Counties Impacted

All Counties.

2.7.6 Category

Core

2.7.7 Data Volume/Performance

N/A

2.7.8 Failure Procedure/Operational Instructions

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

2.8 BenefitsCal: Update Case Inquiry API

2.8.1 Overview

The Case Inquiry API is a RESTful webservice that retrieves case and program information in CalSAWS then sends the information to the Self-Service Portal. This section outlines the necessary modifications for the Case Inquiry API to send the status of a TNB4 Renewals to the Self-Service Portal.

2.8.2 Description of Change

1. Update the Case Inquiry API to include sending the following data elements for TNB4 Renewals to the Self-Service Portal:
    a. Report Due Date
    b. Report Received Date
    c. Report Status
2. Update Case Inquiry logic to include TNB program when checking for FC/AAP/KG aid code. This will restrict CalSAWS from sending case information to the Self-Service Portal.

2.8.3 Execution Frequency

Real Time

2.8.4 Key Scheduling Dependencies

N/A

2.8.5 Counties Impacted

All Counties.

2.8.6 Category

Real Time

2.8.7 Data Volume/Performance

N/A

2.8.8 Failure Procedure/Operational Instructions

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

2.9 Automated Regression Test

2.9.1 Overview

Create new automated regression test scripts to verify the length of the RE period created for a TNB program when EDBC is run for the high-dated period in benefit month December 2023 or later.

2.9.2 Description of Change

1. Create a new regression script to create an ongoing TNB program with an RE Due Month of November 2023 or later. Generate a TNB 4 packet and mark the packet Received. Run EDBC for the first month of the next period and verify that the length of the new RE period is 12 months.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-237256

Allow Employment Services Programs to be Deregistered with Active Payment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Farhat Ulain
	Reviewed By	Matthew Lower, Lien Phan, Gingko Luna

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/12/2023	1.0	Content Revision	Farhat Ulain
08/15/2023	1.1	Design Clarification – Mockup updated 2.5.2-1	Farhat Ulain

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1 OVERVIEW

There are Employment and Training programs offered by State of California or county to those individuals who are already enrolled in primary welfare programs. The programs are WTW, CL, REP, CFET, GA/GR ES and GROW. These programs require individuals to be enrolled in certain trainings/activities to receive work related trainings. Furthermore, these programs offer additional payments to these individuals who enrolled in trainings/activities, so they can take care of their trainings/activities related expenses.

1.1 Current Design

In CalSAWS, worker cannot deregister WTW, CL, REP, CFET, GA/GR ES and GROW programs when there is a pending payment request (payment request that is not in "Disapproved" or "Issuance Created" status). A validation message displays and prevents the worker from updating the program status to Deregistered.

1.2 Requests

Allow WTW, CL, REP, CFET, GA/GR ES and GROW programs status to be Deregistered, even when there is a Payment Request not in "Disapproved" or "Issuance Created" status.

1.3 Overview of Recommendations

1. Update WTW Status Detail page, Cal-Learn Status Detail page, REP Status Detail Page, CFET Status Detail Page, GA/GR Employment Services Status Detail Page and GROW Status Detail page to allow the worker to deregister these programs when there is a Payment Request not in "Disapproved" or "Issuance Created" status.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. Currently, in CalSAWS, payment request(s) get issued only if the program is active on the 1st of the benefit month. There will be no change in the payment request process.
2. Payment request(s)that is not in "Disapproved" or "Issuance Created" status will remain in the same status, after deregistering/discontinuing the program.

2 RECOMMENDATIONS

2.1 WTW Status Detail

2.1.1 Overview

The Welfare-to-Work (WTW) Program is a comprehensive Employment and Training Program designed to promote self-sufficiency. CalWORKs recipients are assessed to determine the best course of action, whether it is immediate placement into a job, placement into an education or training program, or both. CalWORKs recipients who are not exempt must participate in the Welfare-to-Work Program. WTW plan designed to assist individuals with obtaining employment. This change will update the validation on the WTW Status Detail page.

2.1.2 WTW Status Detail Page Mockup

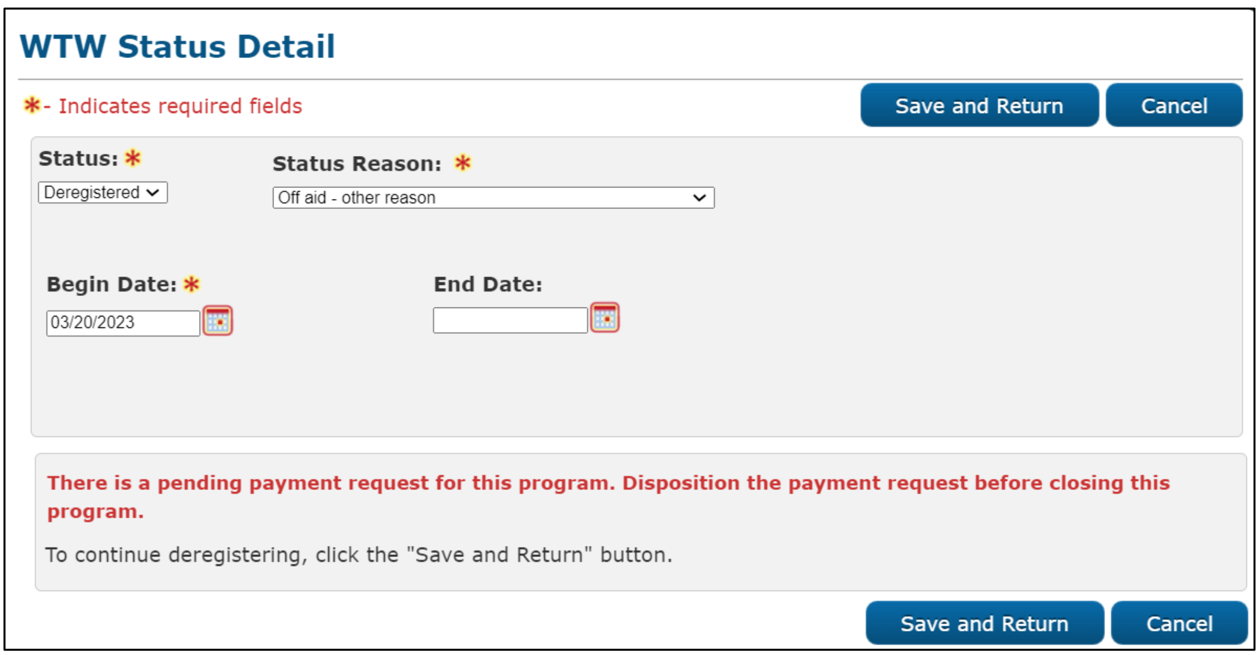


Figure 2.1.2.1 – WTW Status Detail Page

2.1.3 Description of Changes

1. Remove below validation that display when there is an open payment request for the program.
   <Status – There is an open payment related to this program. Remove the Service Arrangement related to this program to close it.>
2. Add a soft validation to the page that will allow the user to continue deregistering the program.

<There is a pending payment request for this program. Disposition the payment request before closing this program.>

a. The validation will be displayed below the status information section as displayed in the figure 2.1.2-1.
b. Add the verbiage below the validation as displayed in the figure 2.1.2-1.
<To continue deregistering, click the "Save and Return" button.>

Note: Above mentioned validation will be displayed upon deregistering the program when there is an active payment for the program that is not in "Disapproved" and "Issuance Created" status, however, it will allow the user to continue deregistering the program.

Once the program is deregistered, payment request(s) for the future moth(s) will not be issued, regardless of the payment request(s) status.

2.1.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** WTW

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 REP Status Detail

2.2.1 Overview

The Refugee Employment Program (REP) provides with employment and training services for an eligible refugee, such as an asylee or Amerasian, Human Trafficking Victim, Domestic Violence and Other Serious Crime Victim, Cuban/Haitian Entrant, and Afghan/Iraqi Special Immigrant Visa

Holder residing in the United States (U.S.). This change will update the validation on the REP Status Detail page.

2.2.2 REP Status Detail Page Mockup

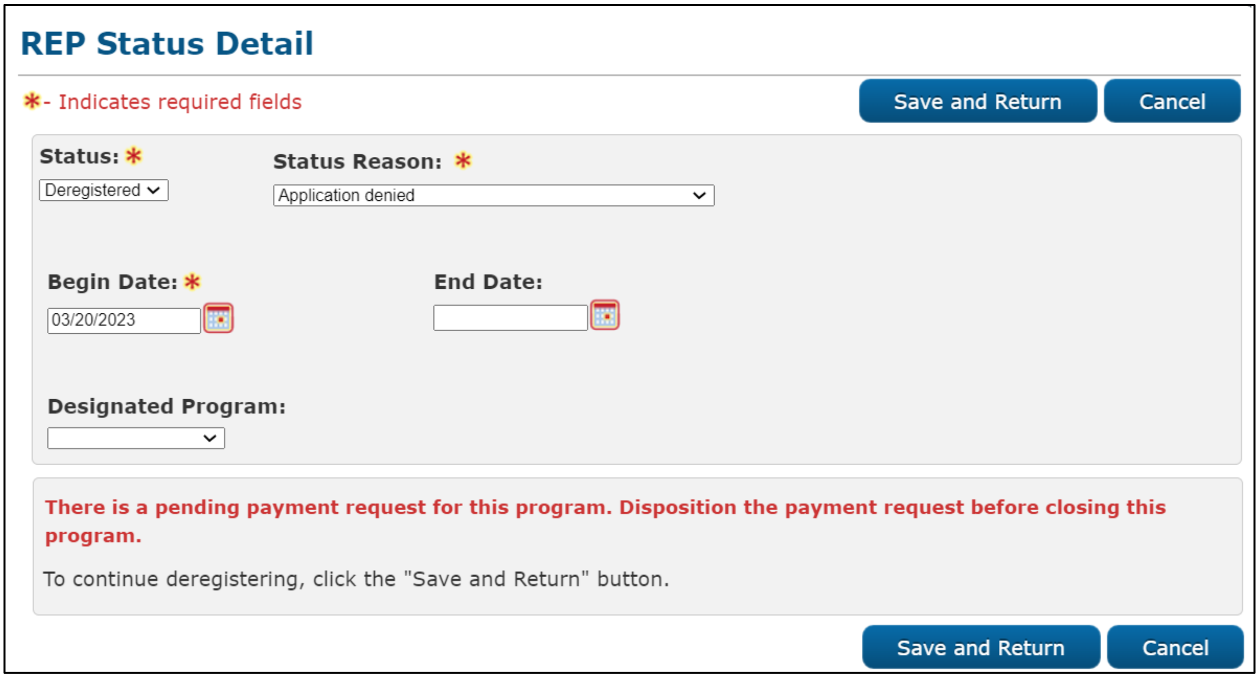


Figure 2.2.2.1 – REP Status Detail Page

2.2.3 Description of Change

1. Remove below validation that display when there is an open payment request for the program.
   <Status – There is an open payment related to this program. Remove the Service Arrangement related to this program to close it.>
2. Add a soft validation to the page that will allow the user to continue deregistering the program.
   <There is a pending payment request for this program. Disposition the payment request before closing this program.>

   a. The validation will be displayed below the status information section as displayed in the figure 2.2.2-1.
   b. Add the verbiage below the validation as displayed in the figure 2.2.2-1.
      <To continue deregistering, click the “Save and Return” button.>

Note: Above mentioned validation will be displayed upon deregistering the program when there is an active payment for the program that is not in “Disapproved” and “Issuance Created” status, however, it will allow the user to continue deregistering the program.

Once the program is deregistered, payment request(s) for the future moth(s) will not be issued, regardless of the payment request(s) status.

2.2.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** REP

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 CFET Status Detail

2.3.1 Overview

The CalFresh Employment & Training program (CFET) is a voluntary program that helps people on CalFresh gain skills, tools, basic education, training, and work experience. This program helps in gaining marketable job skills to get the better jobs and higher wages. This change will update the validation on the CFET Status Detail page.

2.3.2 CFET Status Detail Page Mockup

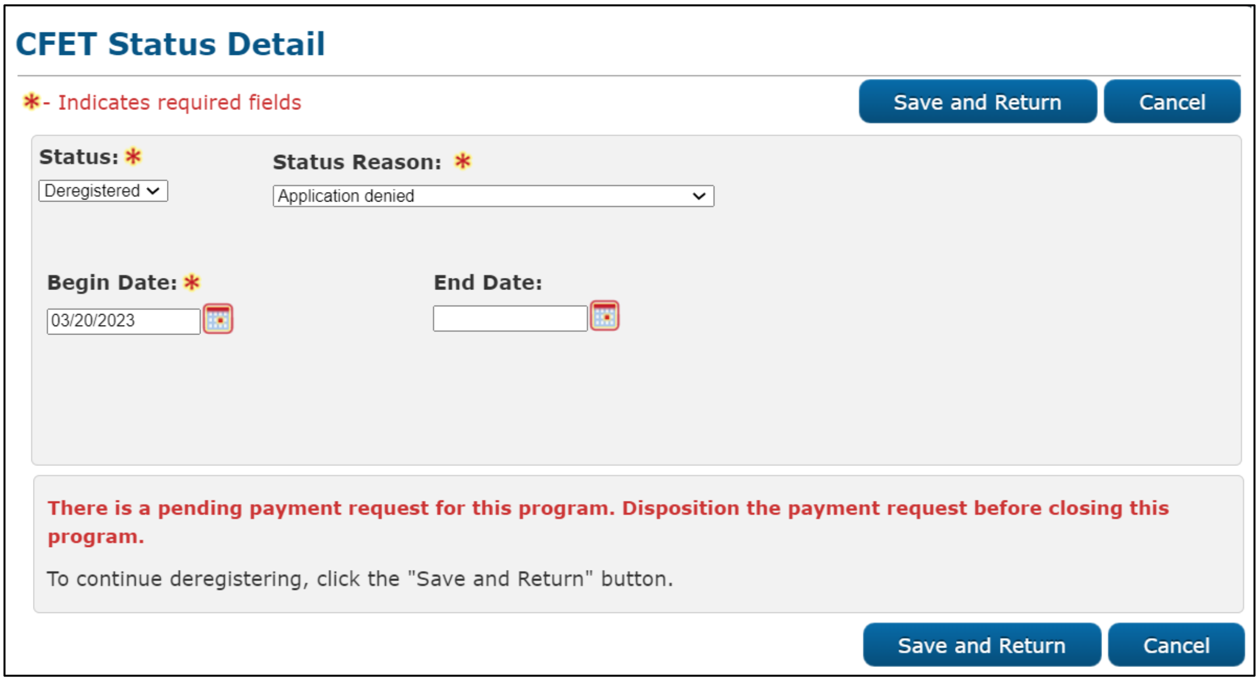


Figure 2.3.2.1 – CFET Status Detail Page

2.3.3 Description of Change

1. Remove below validation that display when there is an open payment request for the program.
   <Status – There is an open payment related to this program. Remove the Service Arrangement related to this program to close it.>
2. Add a soft validation to the page that will allow the user to continue deregistering the program.
   <There is a pending payment request for this program. Disposition the payment request before closing this program.>
   a. The validation will be displayed below the status information section as displayed in the figure 2.3.2-1.
   b. Add the verbiage below the validation as displayed in the figure 2.3.2-1.
      <To continue deregistering, click the "Save and Return" button.>

Note: Above mentioned validation will be displayed upon deregistering the program when there is an active payment for the program that is not in "Disapproved" and "Issuance Created" status, however, it will allow the user to continue deregistering the program
Once the program is deregistered, payment request(s) for the future moth(s) will not be issued, regardless of the payment request(s) status.

2.3.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** CFET

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 GROW Status Detail

2.4.1 Overview

The General Relief Opportunities for Work Program (GROW) provides employment and training services to help employable General Relief (GR) customers obtain jobs and eliminate the need for GR benefits. Participation in GROW is mandatory as a condition of aid. This change will update the validation on the GROW Status Detail page.

2.4.2 GROW Status Detail Page Mockup

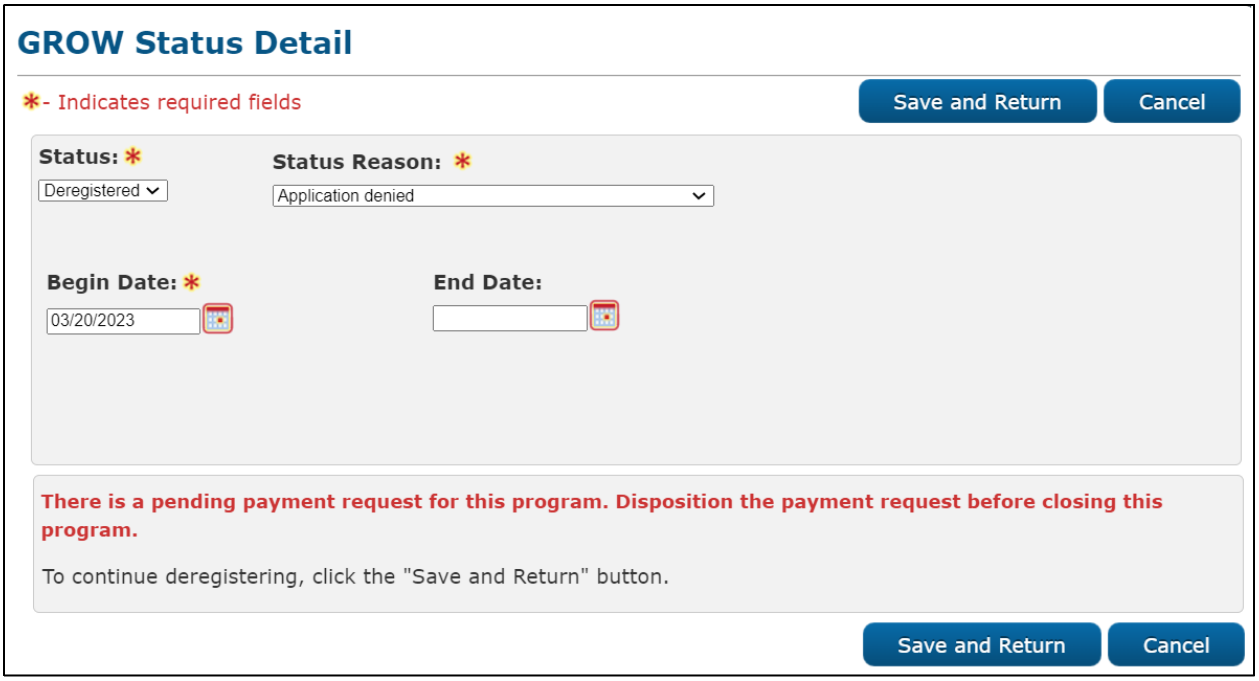


Figure 2.4.2.1 – GROW Status Detail Page

2.4.3 Description of Change

1. Remove below validation that display when there is an open payment request for the program.
   <Status – There is an open payment related to this program. Remove the Service Arrangement related to this program to close it.>
2. Add a soft validation to the page that will allow the user to continue deregistering the program.
   <There is a pending payment request for this program. Disposition the payment request before closing this program.>

   a. The validation will be displayed below the status information section as displayed in the figure 2.4.2-1.
   b. Add the verbiage below the validation as displayed in the figure 2.4.2-1.
      <To continue deregistering, click the "Save and Return" button.>

Note: Above mentioned validation will be displayed upon deregistering the program when there is an active payment for the program that is not in "Disapproved" and "Issuance Created" status, however, it will allow the user to continue deregistering the program.

Once the program is deregistered, payment request(s) for the future moth(s) will not be issued, regardless of the payment request(s) status.

2.4.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** GROW

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

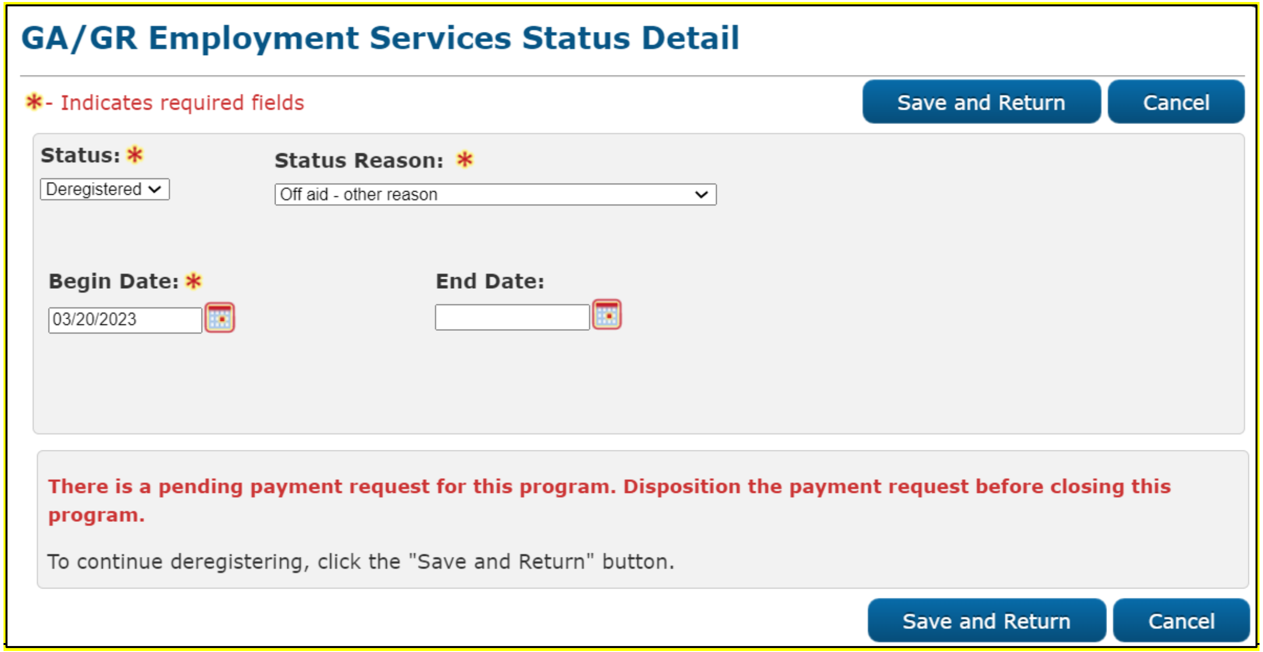
N/A

2.5 GA/GR Employment Services Status Detail

2.5.1 Overview

GA/GR Employment Services is an automated program provides employment and training services to help employable General Assistance/ General Relief (GA/GR) customers obtain jobs and eliminate the need for GA/GR benefits. Participation in Employment Services is mandatory as a condition of aid. This change will update the validation on the GA/GR Employment Services Status Detail page.

2.5.2 GA/GR Employment Services Status Detail Mockup



~~Figure 2.5.2.1 – GA/GR Employment Services Status Detail Page~~

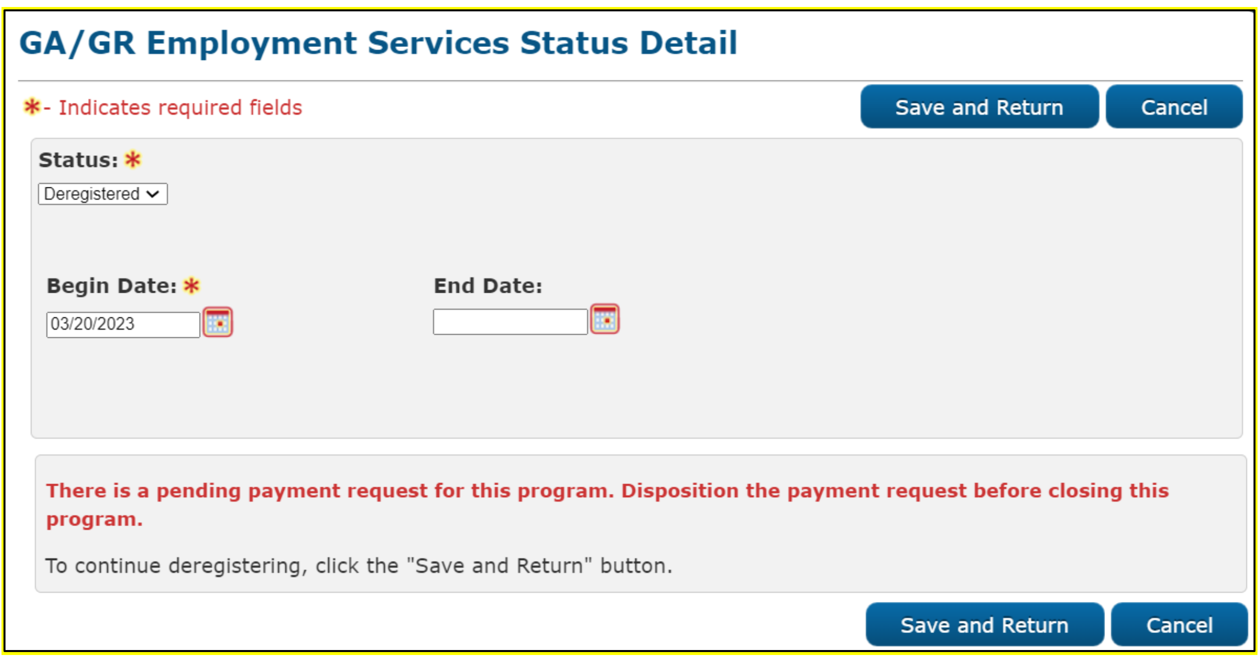


Figure 2.5.2.1 – GA/GR Employment Services Status Detail Page

2.5.3 Description of Change

1. Remove below validation that display when there is an open payment request for the program.

<Status – There is an open payment related to this program. Remove the Service Arrangement related to this program to close it.>

2. Add a soft validation to the page that will allow the user to continue deregistering the program.
   <There is a pending payment request for this program. Disposition the payment request before closing this program.>

   a. The validation will be displayed below the status information section as displayed in the figure 2.5.2-1.
   b. Add the verbiage below the validation as displayed in the figure 2.5.2-1.
      <To continue deregistering, click the "Save and Return" button.>

Note: Above mentioned validation will be displayed upon deregistering the program when there is an active payment for the program that is not in "Disapproved" and "Issuance Created" status, however, it will allow the user to continue deregistering the program.

Once the program is deregistered, payment request(s) for the future moth(s) will not be issued, regardless of the payment request(s) status.

2.5.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** GA/GR Employment Services

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Cal-Learn Status Detail

2.6.1 Overview

Cal-Learn is a statewide program for pregnant and parenting teens in the CalWORKs program. It is designed to encourage pregnant and parenting teens to graduate from high school or its equivalent, become independent, and form healthy families. This change will update the validation on the Cal-Learn Status Detail page.

2.6.2 Cal-Learn Status Detail Mockup

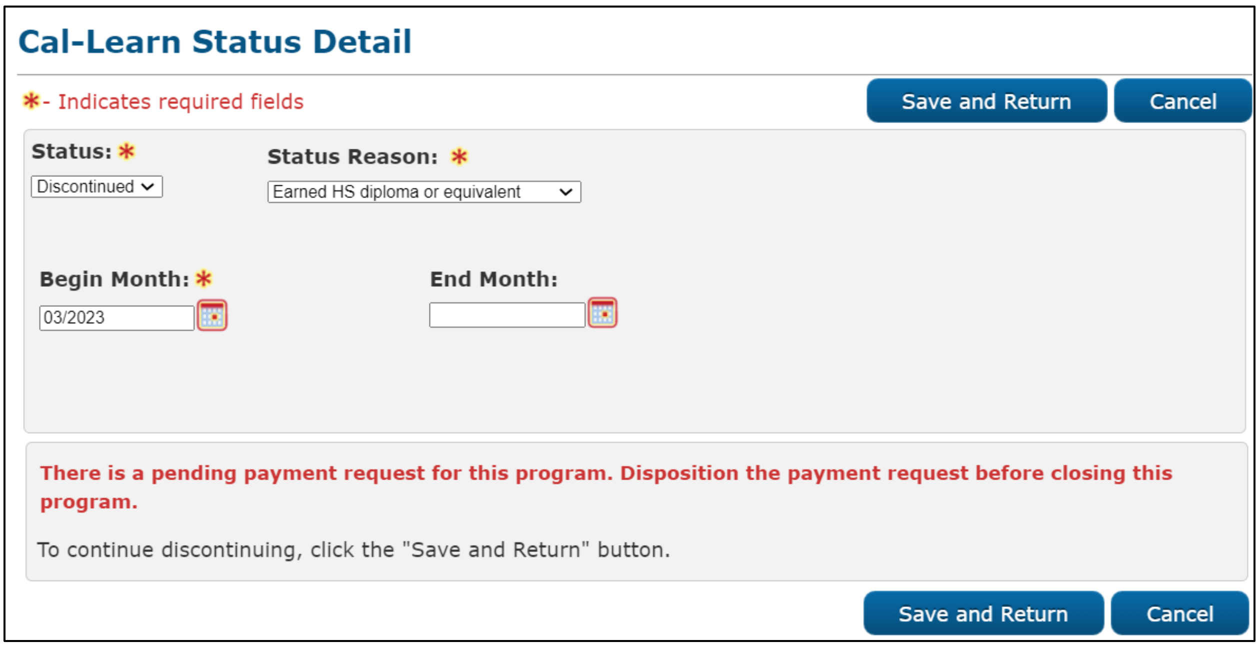


Figure 2.6.2.1 – Cal-Learn Status Detail Page

2.6.3 Description of Change

1. Remove below validation that display when there is an open payment request for the program.
   <Status – There is an open payment related to this program. Remove the Service Arrangement related to this program to close it.>
2. Add a soft validation to the page that will allow the user to continue deregistering the program.
   <There is a pending payment request for this program. Disposition the payment request before closing this program.>

   a. The validation will be displayed below the status information section as displayed in the figure 2.6.2-1.

b. Add the verbiage below the validation as displayed in the figure 2.6.2-1.
   <To continue discontinuing, click the "Save and Return" button.>

Note: Above mentioned validation will be displayed upon discontinuing the program when there is an active payment for the program that is not in "Disapproved" and "Issuance Created" status, however, it will allow the user to continue discontinue the program.

Once the program is discontinued, payment request(s) for the future moth(s) will not be issued, regardless of the payment request(s) status.

2.6.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** Cal-Learn

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.5	The CalSAWS shall provide field-level and cross-field validation upon completion of data entry by user and immediately display appropriate corrective instructions for the related field.	A soft validation will be added to allow user to deregister the program.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-243001

ACIN I-XX-23- FFY 2023-2024 CalFresh COLA; ACL 23-XX CW MAP; ACL 23-XX CW IRT - Run Batch EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/02/2023	1.0	Initial Draft	T. Lazio
08/21/2023	1.1	Content Revision to add the DCR to suppress SAR 2 if multiple SAR 2s exist on a case	Nithya Chereddy

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1 OVERVIEW

This SCR will provide details for the one-time batch run that will apply the new CalFresh (CF) COLA, CalWORKS (CW) MAP and CW IRT amounts for FFY 2024 to the CW, Refugee Care Assistance (RCA) and CF (including Nutritional Benefit) programs for the benefit month of October 2023.

1.1 Current Design

1. CalWORKs uses the MAP values implemented by SCR CA-239411 effective 10/1/2022.
2. CalWORKs uses the CW Income Reporting Threshold (IRT) Tier 1 and Tier 2 level amounts for 2022/2023 that was updated by CA-239411.
3. CalFresh uses values from FFY 2023 that were implemented by SCR CA-239411.

1.2 Requests

Per All County Information Notice (ACIN) I-XX-23 & USDA Food and Nutrition Service SNAP COLA Memo FY 2023, the CF Cost-of-Living Adjustments (COLAs) take effect October 1, 2023 for FFY 2024. The updated values must be implemented in CalSAWS and batch EDBC must run to calculate new benefit amounts for FFY 2024.

Per All County Letter (ACL) 23-XX, the CW Income Reporting Threshold (IRT) Tier 1 level was increased effective 10/1/2023. The updated values must be implemented in CalSAWS and batch EDBC must run to calculate the new IRT.

Per All County Letter (ACL) 23-XX, the CW Maximum Aid Payment (MAP) and Income Reporting Threshold (IRT) Tier 2 level was increased effective 10/1/2023. The updated values must be implemented in CalSAWS and batch EDBC must run to calculate the new values.

1.3 Overview of Recommendations

1. Run Batch EDBC to apply the new CF COLA, CW MAP and CW IRT amounts effective October 1, 2023. Batch EDBC will run for CW, RCA CF/NB and FC programs to apply the new CF COLA, CW MAP and CW IRT amounts and to apply benefit updates.
2. Generate exception listings for Counties to review.

1.4 Assumptions

1. SCR CA-219921 updated the SAR 2 to generate via EDBC so no DCR is needed to trigger or update the SAR 2. The SAR 2 regression testing will be included in this SCR.
2. A regular change NOA will be generated for all impacted cases for which the CF benefits change.

3. Existing batch logic in CalSAWS skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person.
4. Per existing exception logic, batch EDBC run on programs where the existing EDBC for the month is Read-Only will not be authorized.
5. Any Change NOA that currently generates when the respective trigger conditions are met will continue to generate along with the CalFresh Benefit Change COLA NOA. Note: Refer to SCR CA-206711 which updated the triggers for Shelter/Utility Change NOA and the Income Increase NOA. Regression testing of the Shelter/Utility Change NOA will be included with this SCR.
6. No further action is required for no-touch SAR 7 scenarios, as a batch job will run EDBC for the October benefit month.
7. Since the CalFresh population is going to be run through batch EDBC first followed by the SNB population, the following can be expected:
    - If the CF program discontinues then the corresponding SNB will also discontinue.
    - If the CF is excluded through COLA batch for RE/SAR 7 being past due, the system will generate and send the SNB household a SNB Benefit Change NOA.
    - If the RE/SAR 7 is never turned in or is incomplete, the RE/SAR 7 discontinue batch sweep job will discontinue both SNB and CF programs, and the system will generate and send the SNB Discontinue NOA.
    - There are no changes to the logic of the CF notices.
8. An increase in the CalWORKs MAP could potentially change the portion of the ARC amount coming from CalWORKs funds. ARC portion of the FC program EDBCs with 2T, 2S, 2U aid codes shall be processed when there is a change in MAP amounts. There is no CW portion for ARC payments out of 2P or 2R ARC aid codes.
9. CalWIN will be running the CW and CF COLAs for WAVE 5 counties (Alameda, Fresno and Sonoma). WAVE 5 migration will occur after the CalSAWS COLA batch run.
10. Counties can check 'yellow banner' programs daily with the latest Qlik report.

2 RECOMMENDATIONS

Batch EDBC will run for CW, RCA CF/NB and FC programs to apply the new CF COLA, CW MAP and CW IRT amounts and to apply benefit updates.

2.1 Run Batch EDBC for CW, RCA, CF/NB and FC

2.1.1 Overview

CW, RCA, CF/NB, and FC Batch EDBC will run for the benefit month of 10/2023.

2.1.2 Description of Changes

1. Run batch EDBC for the benefit month of 10/2023 including past RE due date cases for:
    a. All cases with an active or ineligible Foster Care program with ARC aid codes 2T, 2S, 2U effective for 10/2023 in single program mode. Exclude the following cases:
        i. EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month.
        ii. EDBC will not run if a regular EDBC has already been processed for the benefit month since SCR CA-243002 went into production.
        ~~iii. EDBC will not run if there is an EDBC already processed for the benefit month for WAVE 5 counties (Alameda, Fresno and Sonoma). See Assumption # 9.~~
        iv. Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'.

    b. Run the above population with Run Reason 'CW/CF COLA' (CT744_CF).
    c. Run the above population with Sub Type code 'CW/CF COLA' (CT942_C1).
    d. Batch EDBC will insert the following Journal entry:
        Short Description: Batch EDBC ran for <month, year>
        Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the program for following reasons: CW/CF COLA

2. Run batch EDBC for the benefit month of 10/2023 for:
    a. All cases with an active or ineligible CalWORKs or RCA program in targeted program mode. Targeted program mode will include CF and NB programs on the targeted cases. Exclude the following cases:

i. The benefit month is past the latest RE due date for the program.
ii. The program has a SAR7 Due Month of 09/2023, and the report status is Sent, Received, or Incomplete.
iii. A regular EDBC has already been processed for the benefit month since SCR CA-243002 went to production.
~~iv. EDBC will not run if there is an EDBC already processed for the benefit month for WAVE 5 counties (Alameda, Fresno and Sonoma). See Assumption # 9.~~
v. Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'.

b. Run the above population with Run Reason 'CW/CF COLA' (CT744_CF).
c. Run the above population with Sub Type code 'CW/CF COLA' (CT942_C1).
d. Batch EDBC will insert the following Journal entry:
Short Description: Batch EDBC ran for <month, year>
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the program for following reasons: CW/CF COLA.

3. Run batch EDBC for the benefit month of 10/2023 for:
    a. All active or ineligible CF (including TCF) programs in targeted program mode and include NB program. Exclude the following cases:
        i. The benefit month is past the latest RE due date for the program.
        ii. The program has a SAR7 Due Month of 09/2023, and the report status is Sent, Received, or Incomplete.
        iii. EDBC has already been processed for the benefit month since SCR CA-243002 went to production.
        ~~iv. EDBC will not run if there is an EDBC already processed for the benefit month for WAVE 5 counties (Alameda, Fresno and Sonoma). See Assumption # 9.~~
        v. Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'.

    b. Run the above population with run reason 'CF COLA' (CT744_FS).
    c. Run the above population with Sub Type code 'CF COLA' (CT942_C3)
    d. Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for <month, year>
Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the program for following reasons: CF COLA.

2.1.3 Programs Impacted

CW

RCA

CF

TCF

NB

FC

2.2 Create a DCR to Suppress SAR 2

2.2.1 Overview

Currently, there are cases in which a SAR 2 is being generated for both the CalFresh and CalWORKS programs during this COLA run. Given that a single SAR 2 per case is sufficient, this recommendation involves implementing the DCR process operationally to prevent the generation of multiple SAR 2s for a single case in conjunction with this COLA run.

2.2.2 Description of changes

Run the DCR operationally to mark the earliest generated SAR 2 as 'Printing Error' if more than one SAR 2 generated on a case with this COLA run.

Example: If a SAR 2 got generated for CF at 2.15PM and a SAR 2 got generated for CW at 2.16PM for the same case, the SAR 2 that got generated at 2.15PM (which is for CF) will be marked as 'Printing Error' given that this was the earliest generated SAR 2 on the case.

3 OUTREACH

3.1 Lists

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

Region	Counties

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

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

Standard Columns:

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

1. **List Name**: List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".
   <u>Note:</u> Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**
   Additional Column(s): Program Type and Program Closure Reason
   NOTE: Include a separate list for FC programs run as part of recommendation 2.1.2.1a.

2. **List Name**: List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person"
   <u>Note:</u> Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**
   Additional Column(s): Program Type

3. **List Name**: List of cases where the CW EDBC resulted in a benefit reduction. The case listing will be named "List of CW Cases that Resulted in Benefit Reduction".
   <u>Note:</u> Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**
   Additional Column(s): Include columns to indicate each benefit reduction type in a separate column (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)

4. **List Name**: List of cases which resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC'.

Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**
Additional Column(s): Program Type, Read-Only Reason
NOTE: Include a separate list for FC programs run as part of recommendation 2.1.2.1a.

5. **List Name**: List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".
   Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**
   Additional Column(s): Skip Reason, Program Type
   NOTE: Include a separate list for FC programs run as part of recommendation 2.1.2.1a.

6. **List Name**: Generate a list of cases that meet all the following criteria. The case listing will be named 'List of Cases where an Optional Child was Added Back into the Household by Batch EDBC':
   i. Has an active CW program person for benefit month of 09/2023 with an MMO and role reason 'Optional Child - Receives Child Support'
   ii. That same program person has an active status and role of MEM for the benefit month of 10/2023.
   iii. Latest accepted and saved CW EDBC for the 10/2023 benefit month has a source of 'Batch EDBC Rules'
   iv. None of the following conditions exist:
      1) RE or SAR period ended in 09/2023
      2) Program person has a Customer Option of type 'Optional Child - Receives Child Support' with an end-date in 09/2023

   Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**

   Additional Column(s): N/A

   NOTE: SCR CA-205112 will update the functionality to only allow Optional Child back into the household mid-period if user makes the request. This listing will no longer be needed once CA-205112 is implemented in CalSAWS.

7. **List Name**: Generate a list of CW and/or CF cases that meet the following criteria. The case listing will be named 'List of Cases Discontinued Or Denied for Over Income Prior to COLA Increase':
   i. EDBC run between 7/31/2023 and prior to deployment of CTCR SCR CA-243002 for the benefit month of 10/2023 has a denial or discontinuance reason of "Over Income" or "Over Income- $0 Allotment"

   Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**

Additional Column(s): Program Type, Program Status Reason

8. **List Name**: Generate a list of CW and/or CF cases that meet the following criteria. The case listing will be named 'List of Cases with at least one overridden EDBC for COLA Months':
   i. There is at least one overridden EDBC effective for the current or the Prior Benefit month
   ii. Batch EDBC is run for the COLA Month (10/2023)
   iii. Program is CalFresh, CalWORKs, RCA or Nutritional Benefit

   Note: Each region listed above will have its own list. The list name will include the region, for example, 'Region 1' will be '**List Name -R1'**
   Additional Column(s): Program Type
   NOTE: The case information will display only once on the list even if more than one month may be impacted.

The **non-Foster Care program** lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-243001

The **Foster Care program** lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-243001 > Foster Care Lists

4 APPENDIX

4.1 Batch Operations:

a) Run the driving query for FC program (population from recommendation 2.1.2.1a in SCR CA-243001) to insert into SYS_TRANSACT_COLA in 'Single Program' mode to run for the month of 10/2023.

b) Run Batch EDBC for cases with FC program (population from recommendation 2.1.2.1a in SCR CA-243001) identified in (a) above.

c) Run the driving query for CW/RCA programs with associated CF and NB programs (population from recommendation 2.1.2.2a in SCR CA-243001) to insert into SYS_TRANSACT_COLA in 'Targeted Program' mode to run for the month of 10/2023.

d) Run Batch EDBC for cases with CW/RCA programs with associated CF and NB programs (population from recommendation 2.1.2.2a in SCR CA-243001) identified in (c) above.

e) Run the driving query for CF program with associated NB program (no CW/RCA- population from recommendation 2.1.2.3a in SCR CA-243001) to insert into

SYS_TRANSACT_COLA in 'Targeted Program' mode to run for the month of 10/2023.

f) Run Batch EDBC for cases with CF program with associated NB program (no CW/RCA - population from recommendation 2.1.2.3a in SCR CA-243001) identified in (e) above.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245440

Accelerated Enrollment (8E) from SAWS Applications

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Cynthia Ridley
	Reviewed By	Renee Gustafson, Rupalatha Putta, Geetha Ramalingam, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/20/2023	.01	Created Document	Cynthia Ridley
05/31/2023	.02	Reviewed with Build/Test	Cynthia Ridley
05/31/2023	.03	Reviewed with Consortium Analysts	Cynthia Ridley
06/05/2023	.04	Updated Design from Consortium Analysts review and re-submitted for Consortium Analysts review	Cynthia Ridley
06/05/2023	1.0	Submitted for Medi-Cal Committee Review	Cynthia Ridley
06/22/2023	2.0	Updated Design based on Committee comments and sent out for Committee Review	Cynthia Ridley
07/13/2023	2.1	Removed recommendation to update running Negative Action EDBC to 'Pend' an individual who is 'Conditionally Eligible' for AE since Recommendation #4 will create the 'Pending' record for an individual who meets the criteria in recommendation #4. Removed recommendation to allow Mega-Mandatory to be accepted and saved when an individual is found eligible for both 'Mega-Mandatory' and 'Conditionally Eligible' for AE as based on testing this scenario should not occur.	Cynthia Ridley
07/27/2023	2.2	Content Revision: Added Recommendation to Update MAGI Determination List and MAGI Determination Summary pages to include Household Eligibility status of 'Conditionally Eligible – AE' Updated the MAGI Emulator to use a different Life Event Code to return DERs with Conditionally Eligible - AE	Cynthia Ridley
08/08/2023	2.3	Submitted Content Revision for	Cynthia Ridley

		Build/Test Review	
08/08/2023	2.4	Submitted Content Revision for Consortium Analyst Review	Cynthia Ridley
08/21/2023	2.5	Added Design Clarifications and additional criteria for Recommendation 2.1.2.2-4 Combined 2.3.2.2 a and b MAGI Emulator updates	Cynthia Ridley
8/25/2023	2.6	Finalized Content Revision	Renee Gustafson

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1 OVERVIEW

With CalHEERS CR 216356, CalHEERS will begin granting MAGI Medi-Cal Conditionally Eligible for Accelerated Enrollment with primary aid code 8E regardless of access channel of the Medi-Cal application. An individual will be considered Conditionally Eligible for Accelerated Enrollment when verifications are outstanding, except for MEDS MEC, and would otherwise be MAGI Pending. Accelerated Enrollment is temporary eligibility and should not be considered a full MAGI Medi-Cal determination. Individuals granted Accelerated Enrollment should be considered as ‘Pending’ for a full MAGI Medi-Cal Determination and should not have ongoing eligibility established under aid code 8E.

CalHEERS currently only determines Accelerated Enrollment when an individual applies via the CalHEERS portal. With this change, CalHEERS will begin granting Accelerated Enrollment via the Eligibility Determination Request via eHIT from CalSAWS.

This SCR will update CalSAWS to treat individuals granted Accelerated Enrollment from CalHEERS as ‘Pending’ a full MAGI Medi-Cal determination.

1.1 Current Design

CalHEERS is the system that determines MAGI Medi-Cal and sends Accelerated Enrollment (8E) as the primary aid code with MAGI Conditionally Eligible in the Determination Eligibility Response (DER/DER-U) when an individual with any outstanding verifications, except for MEDS MEC… would otherwise be ‘Pending’ for MAGI Medi-Cal.

Medi-Cal EDBC logic will pass the MAGI budget making a person as an Active MEM with the primary aid code provided in the MAGI Determination for anyone with MAGI status of ‘Eligible’ or ‘Conditionally Eligible’.

Accelerated Enrollment 8E is meant to be a temporary aid code and CalHEERS sends them to MEDS with their HX20 transactions. 8E is not a SAWS-managed aid code so it should not be sent to MEDS from CalSAWS.

Business process is for users to request the verification and then evaluate the applicant for final MAGI determination with the updated verification or deny for Failure to Complete Determination.

Running EDBC and making the individual an Active MEM on aid code 8E doesn't allow the opportunity to Deny the application in CalSAWS because the Program is already made Active.

While CalHEERS should not send APTC (X1-X9) aid codes with MAGI Eligible or Conditionally Eligible status, they sometimes do. Also, CalSAWS does not prevent running EDBC to grant MAGI with APTC aid codes if the DER did incorrectly contain this combination.

The system will display the Household Eligibility from the DER on the MAGI Determination List and MAGI Determination Summary pages.

1.2 Requests

Update the Medi-Cal EDBC rules to consider a person 'Pending' if the MAGI Determination results in a 'Conditionally Eligible' status with aid code 8E.

Update the Medi-Cal EDBC rules to no longer consider APTC aid codes in the MAGI Determination.

Update the MAGI Determination List page and MAGI Determination Summary Page to display 'Conditionally Eligible – AE' as Household Eligibility when at least one individual in the MAGI Determination is determined Conditionally Eligible to Accelerated Enrollment and no individual is MAGI Pending.

1.3 Overview of Recommendations

1. Add a hard validation on the Run EDBC and Negative Action EDBC pages to prevent a worker from running Medi-Cal EBDC when individuals in the MAGI Determination result in 'Conditional Eligible' for Accelerated Enrollment.
2. Update the Medi-Cal EDBC Rules to consider an individual's status as 'Pending' and not grant Active MEM status on the Medi-Cal program for individuals who are 'Conditionally Eligible' on the MAGI Determination for Accelerated Enrollment.

3. Update the Medi-Cal EDBC Rules to save the EDBC as a Read-Only when the MAGI Determination results in an Eligible status, and the aid code used in EDBC is an APTC Aid code.
4. Add a new Batch EDBC Skip Reason to prevent running Batch EDBC for a Medi-Cal program where any individual on the MAGI Determination are 'Conditionally Eligible' for Accelerated Enrollment.
5. Update the MAGI Determination List page and MAGI Determination Summary page to display 'Conditionally Eligible – AE' as Household Eligibility when at least one of the individuals in the MAGI Determination has MAGI Conditionally Eligible Status and primary aid code of '8E' and no individuals with MAGI Pending Status.

1.4 Assumptions

1. Accelerated Enrollment aid code is temporary, counties will continue to follow their current business process (including requesting a new MAGI determination) to finalize the Eligibility Determination when the initial determination resulted in Accelerated Enrollment.

2 RECOMMENDATIONS

2.1 MAGI Determination List and MAGI Determination Summary

2.1.1 Overview

Update the MAGI Determination List page and MAGI Determination Summary page to display ‘Conditionally Eligible – AE’ as Household Eligibility when at least one of the individuals in the MAGI Determination has MAGI Conditionally Eligible Status and primary aid code of ‘8E’ and no individuals with MAGI Pending Status.

2.1.2 MAGI Determination List Page Mockup

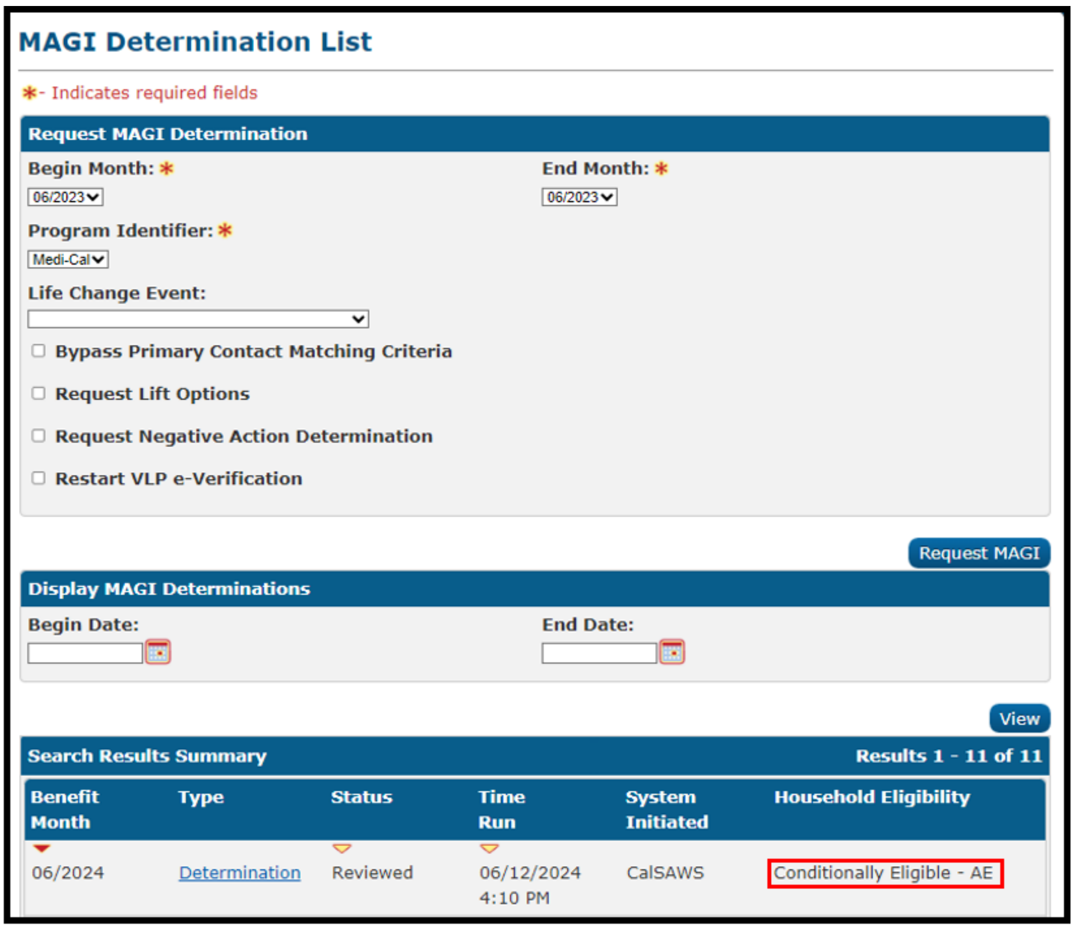


Figure 2.1.1 – MAGI Determination List Page displaying Household Eligibility as ‘Conditionally Eligible – AE’

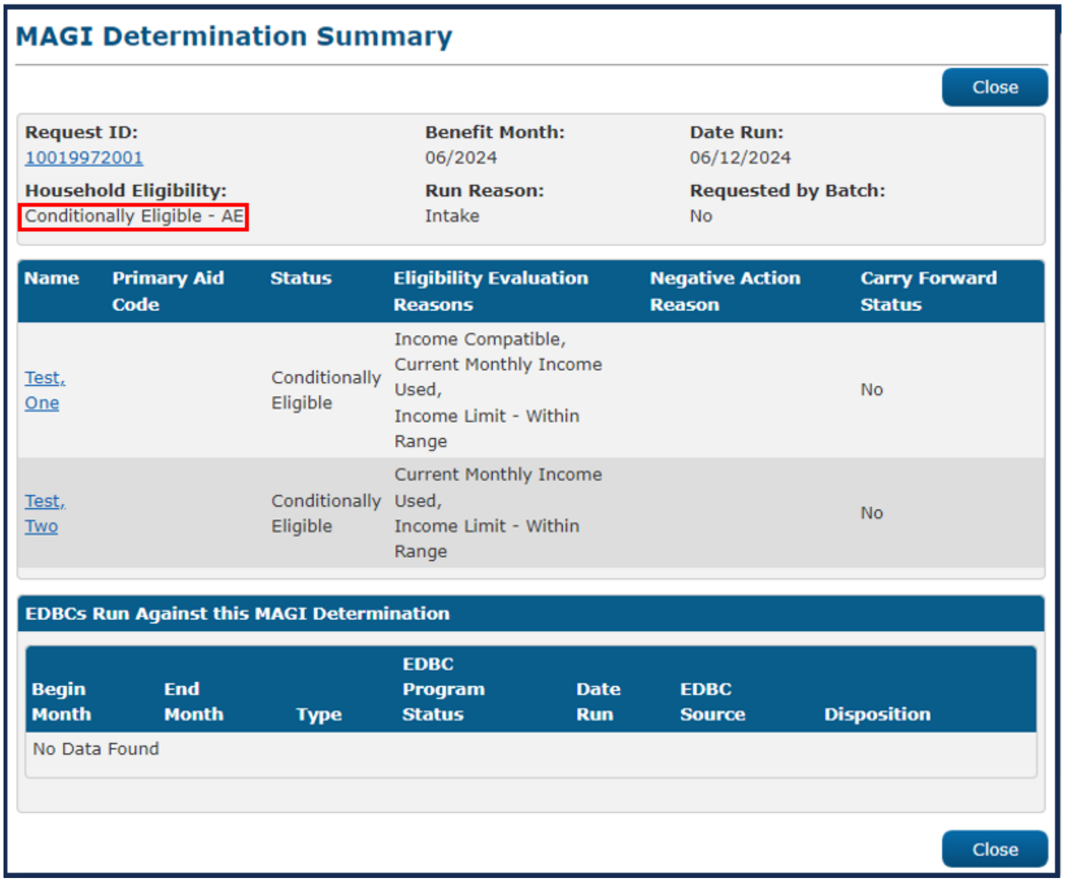


Figure 2.1.2 – MAGI Determination Summary Page displaying Household Eligibility as ‘Conditionally Eligible – AE’

2.1.3 Description of Changes

1. Update the MAGI Determination List page and MAGI Determination Summary page to display the Household Eligibility status based on the MAGI eligibility status(es) returned in the DER.
   a. Update the following Household Eligibility status to display when the following are true:

Household Eligibility	MAGI Eligibility Status in DER
Conditionally Eligible	• At least one person MAGI Conditionally Eligible, **and** • No person is MAGI Pending, **and** • No person is MAGI Conditionally Eligible to 8E

b. Add the following Household Eligibility status to display when the following are true:

Household Eligibility	MAGI Eligibility Status in DER
Conditionally Eligible – AE	• At least one person MAGI Conditionally Eligible to 8E **and** • No person is MAGI Pending

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility

2.1.5 Security Updates

No Changes

2.1.6 Page Mapping

No Changes

2.1.7 Accessibility

The following Accessibility enhancements have been identified:

- Id attribute must be unique.

Note: This is out of scope for this SCR and will be updated in a future SCR.

2.1.8 Page Usage/Data Volume Impacts

No Changes

2.2 Eligibility Rules Update

2.2.1 Overview

Add a hard validation on the Run EDBC and Negative Action EDBC pages to prevent a worker from running Medi-Cal EBDC when individuals in the MAGI Determination result in 'Conditional Eligible' for Accelerated Enrollment.

Update the Medi-Cal EDBC Rules to consider an individual's status as 'Pending' and not grant Active MEM status on the Medi-Cal program for individuals who are 'Conditionally Eligible' on the MAGI Determination for Accelerated Enrollment.

Update the Medi-Cal EDBC Rules to save the EDBC as a Read-Only when the MAGI Determination results in an Eligible status, and the aid code used in EDBC is an APTC Aid code.

2.2.2 Description of Changes

1. Add the following new Program Reason Code 'Active on AE' to (CT_73).
2. Add a hard validation on the Run EDBC page to prevent the worker from running Medi-Cal EDBC on a case when all are true:
    a. All individuals have a Requested Medi-Cal Type = 'Medi-Cal'
    b. All Individuals on the valid DER have a combination of MAGI Eligibility Status 'Pending' with no aid code and MAGI Eligibility status, 'Conditionally Eligible' with Primary Aid Code '8E'.
    OR
    All individuals on the valid DER have MAGI Eligibility Status 'Conditionally Eligible' with Primary Aid Code '8E', and
    c. ~~EDBC is run in MAGI Only Mode~~ All individuals have Customer Option: Full Medi-Cal Hierarchy set to 'No' or 'Blank'.

    Validation Message: "Medi-Cal: EDBC cannot be run for this program. At least one open applicant in the valid MAGI Determination are MAGI 'Conditionally Eligible' for Accelerated Enrollment."
    Note: Currently, the system saves EDBC as a 'Read-Only' when all individuals in the case have a 'Pending' Status.

3. Add a hard validation on the Negative Action EDBC page to prevent the worker from running Negative Action EDBC on a case when the following criteria is met:
    a. All individuals have a requested Medi-Cal Type = 'Medi-Cal'
    b. All individuals on the valid DER have Eligibility Status 'Conditionally Eligible' with Primary Aid Code '8E'.
    c. Any Negative Action Reason below are not being applied to ~~the~~ all Accelerated Enrollment individuals.
        - Inter-County Transfer
        - Worker Initiated-Skip CalHEERS
        - Incomplete MAGI Application
        - Gets APTC

       Note: These Negative Action Reasons allow running EDBC without requiring a Negative Action MAGI Determination.

    Validation Message: "Negative Action Medi-Cal: Negative Action EDBC cannot be run for this program. At least one open applicant in the valid MAGI Determination are MAGI 'Conditionally Eligible' for Accelerated Enrollment and there is no Negative Action MAGI Determination."

4. Update Medi-Cal EDBC rules to save person status as ‘Pending’ with status reason ‘Active on AE’ and Role of ‘FRI’ and Role Reason ‘Active on AE’ on the ‘MAGI’ budget ~~on the Medi-Cal EDBC Summary page~~ when all are true:
    a. The individual has a Requested Medi-Cal Type = ‘Medi-Cal’.
    b. The individual has MAGI Eligibility Status in the valid DER = ‘Conditionally Eligible’ with Primary Aid Code = ‘8E’.

Note: If at least one person has Full Medi-Cal Hierarchy = Yes, the current Medi-Cal Hierarchy rules will allow EDBC to run starting with Mega Mandatory. When every person is determined Medi-Cal Pending, the EBDC will be ‘Read-Only’ with reason ‘Pending MC Program Created’.

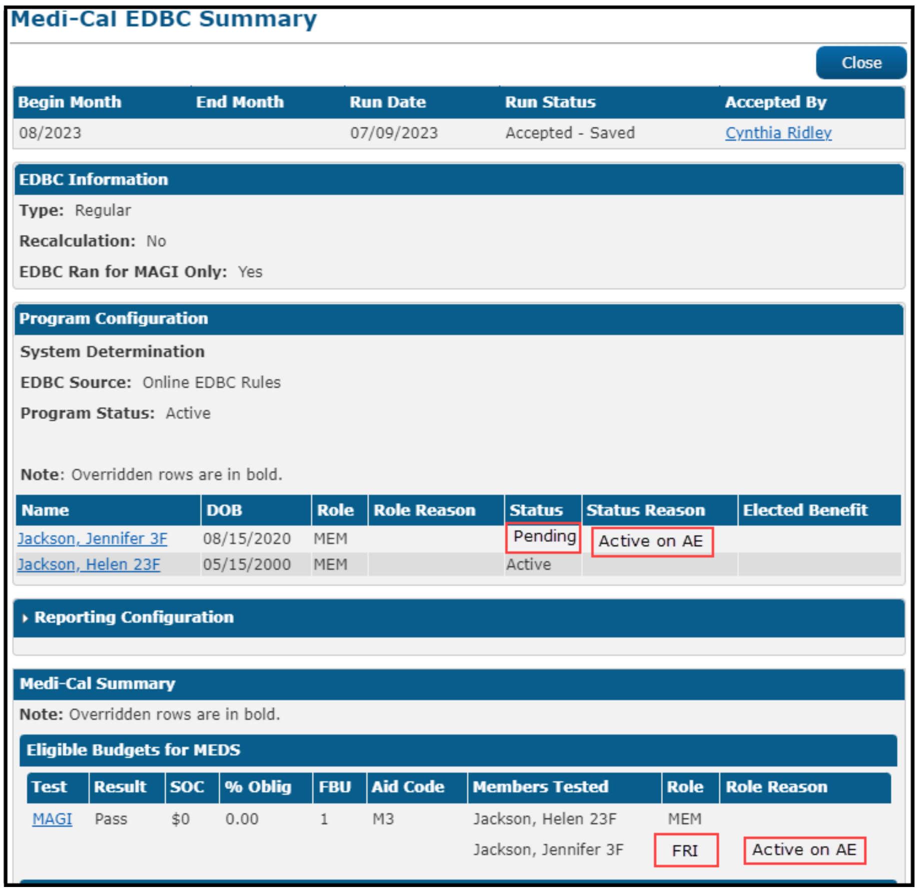


Figure 2.1 Medi-Cal EDBC Summary page for Accelerated Enrollment individual.

5. Update the following columns in Aid Code (CT_184) to no longer be available as follows:

CODE NUM IDENTIF	ID	Column	Value
8E	108181	Valid for Override (19)	‘No’
		Valid for OPA (29)	‘No’
		Valid for Manual EDBC (30)	‘No’

6. Add new Type Reason ‘Aid Code in Determination is not a MAGI aid code’ to (CT_502)
7. Update Medi-Cal EDBC rules to make the EDBC a Read-Only with Type Reason from 2.1.2.8 when the MAGI Medi-Cal Determination status is ‘Eligible’, and the Primary Aid Code provided is one of the below APTC aid codes:

CODE NUM IDENTIF	SHORT_DECODE_NAME
X1	X1 - Covered CA Subsidized (APTC and/or State Subsidy) greater than 250%FPL
X2	X2 - Covered CA Subsidized 100-150%
X3	X3 - Covered CA Subsidized 151-200%
X4	X4 - Covered CA Subsidized 201-250%
X5	X5 - Covered CA Cost Sharing Waiver 100-300%
X6	X6 - Covered CA AI/AN CSR Only No Income Test
X7	X7 - Covered CA Unsub Coverage or Ineligible for Subsidies Above 600%
X8	X8 - Covered CA Lawful Present/MC Ineligible Under 100%
X9	X9 - Covered CA State Subsidy Eligible 400-600%

Note: Worker will need to request a new MAGI Determination to attempt to get a MAGI aid code or open a CalHEERS ticket if unable to get the correct aid code.

2.2.3 Programs Impacted

Medi-Cal

2.2.4 Performance Impacts

N/A

2.3 Batch EDBC

2.3.1 Overview

Add a new Batch EDBC Skip Reason to prevent running Batch EDBC for a Medi-Cal program where any individual on the MAGI Determination are 'Conditionally Eligible' for Accelerated Enrollment.

2.3.2 Description of Change

1. Add the following Skip Reason 'Active on Accelerated Enrollment with Aid Code 8E' to (CT_707)
2. Update Batch EDBC to skip the Medi-Cal program from batch processing when all the following criteria is met:
    a. Any individual in the valid DER has a MAGI status of 'Conditionally Eligible' with Primary Aid Code '8E'.
    ~~b. Any individual in the valid DER with Primary Aid Code '8E'.~~

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

All Counties

2.3.6 Category

N/A

2.3.7 Data Volume/Performance

N/A

2.3.8 Failure Procedure/Operational Instructions

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

2.4 MAGI Emulator

2.4.1 Overview

Update the MAGI Emulator to return MAGI Determinations with individuals with a 'Conditionally Eligible' status and Primary Aid code of '8E'.

2.4.2 Description of Change

1. Return 'Conditionally Eligible' status with Primary Aid Code '8E' for all individuals in the MAGI Determination with the following criteria:
    - If the life event code is ~~'Other Qualifying Event'~~ 'Released from incarceration', return a MAGI Determination with 'Conditionally Eligible' status and Primary Aid Code of '8E'.
2. Return 'Conditionally Eligible' status with Primary Aid Code '8E' for an individual in the MAGI Determination with the following criteria:
    - The life event code is blank and the
    - Second digit of the SSN is a '1', and the
    - Last digit of the SSN is '1'.

    ~~then return a MAGI Determination with 'Conditionally Eligible' and Primary Aid Code of '8E'.~~

2.5 Automated Regression Test

2.5.1 Overview

Create new automated regression test scripts to verify the hard validation on the Run EDBC and Negative Action Detail pages, the granting of Aid Code 8E in various household compositions (ex., 8E plus other MAGI; 8E plus Mega Mandatory), the Role and Role Reason values on the Medi-Cal EDBC Summary page when Aid Code 8E is granted, and the unavailability of the Elected Benefit option in an Accelerated Enrollment plus Mega Mandatory scenario.

2.5.2 Description of Change

Create new regression scripts to verify each of the following:

1. The hard validation message displays on the Run EDBC page when all Medi-Cal applicants meet the Accelerated Enrollment criteria.
2. The hard validation message displays on the Negative Action EDBC page when all Medi-Cal applicants meet the Accelerated Enrollment criteria.

3. Regular Medi-Cal EDBC can be run, accepted, and saved in the Intake month for a household with at least 1 applicant meeting the Accelerated Enrollment criteria and at least 1 other applicant who is MAGI Eligible on the valid DER for the intake month. The Accelerated Enrollment applicant's status is 'Pending' with the applicable status reason at the program level, with Role 'FRI' and the applicable role reason on the MAGI budget.
    - Secondary scope: Verify that running regular EDBC for the next month generates a Read-Only result.
4. Negative Action Medi-Cal EDBC can be run, accepted, and saved in the Intake month for a household with at least 1 applicant meeting the Accelerated Enrollment criteria, and at least 1 other applicant who is MAGI Eligible on the valid DER for the intake month, neither of whom are selected for Denial via Negative Action. The Accelerated Enrollment applicant's status is 'Pending' with the applicable status reason at the program level, with Role 'FRI' and the applicable role reason on the MAGI budget.
    - Secondary scope: Verify that running regular EDBC for the next month generates a Read-Only result.
5. Regular Medi-Cal EDBC can be run, accepted, and saved in the Intake month for a household with at least 1 applicant meeting the Accelerated Enrollment criteria and at least 1 other applicant who is eligible to a Mega Mandatory program. The Accelerated Enrollment applicant's status is 'Pending' with the applicable status reason at the program level, with Role 'FRI' and the applicable role reason on the MAGI budget.
6. Negative Action Medi-Cal EDBC can be run, accepted, and saved in the Intake month for a household with at least 1 applicant meeting the Accelerated Enrollment criteria, and at least 1 other applicant who is eligible to a Mega Mandatory program, neither of whom are selected for Denial via Negative Action. The Accelerated Enrollment applicant's status is 'Pending' with the applicable status reason at the program level, with Role 'FRI' and the applicable role reason on the MAGI budget.
7. Aid code 8E is not available for selection in the following Medi-Cal scenarios / pages:
    - Other Program Assistance
    - Override of Regular EDBC
    - Manual EDBC

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246603

Add Flexible Appointment Scheduling Option and Update GEN 102 To Current Version (1/22)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry, Trevor Torres, Avinda Bandaranayake
	Reviewed By	Caroline Bui, Maria Arceo, Tiffany Huckaby, Matthew Lower, Priya Sridharan, Howard Suksanti, Michael Wu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/15/2022	1.0	Initial Creation	Connor Gorry
10/12/2022	1.1	Preview with CW/CF Committee	Connor Gorry, Trevor Torres
11/03/2022	1.2	Internal Design Review	Connor Gorry, Trevor Torres, Avinda Bandaranayake
11/16/2022	1.3	Committee Review	Connor Gorry, Trevor Torres, Avinda Bandaranayake
11/22/2022	1.4	Updates per Committee Feedback	Connor Gorry, Trevor Torres, Avinda Bandaranayake
12/01/2022	1.5	Voting Postponed; Updates to split 'Duration' from 'Begin' and 'End' times.	Connor Gorry, Trevor Torres, Avinda Bandaranayake
02/08/2023	1.6	Updated presentation for CF/CW Committee. Updates to time and duration fields, Select Intake Appointment Detail Page, and Packet Population Logic	Connor Gorry, Trevor Torres, Avinda Bandaranayake
05/23/2023	1.7	Updates as per committee comments	Phong Xiong
06/16/2023	1.8	Content Revision: Add Form Sender Writer Batch Job and Form Status Batch Job updates for the new packets	Gillian Noelle Bendicio
06/22/2023	1.9	Content Revision: Minor clarifications for sections 2.9, 2.10, and 2.11. Added new section 2.12. Updated supporting documents section. Clarified section 1.1 and added new	Phong Xiong

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		assumption in section 1.4.	
07/20/2023	1.10	Design Clarification – Removing Assumption #10 since Content Revision has added BenefitsCal section.	Phong Xiong
07/24/2023	1.11	Content Revision2: Updated a Validation for sections 2.1 and 2.2. Updates to Description of Changes for sections 2.2, 2.3, 2.4, and 2.5. Updates to Figure images for section 2.1 and 2.2. Added "Pending Assignment List" as section 2.8.	Trevor Torres
7/28/2023	1.12	Content Revision2: Removing section 2.15 Updates to worker schedule are not needed. Updating with additional assumptions	Avi Bandaranayake
8/2/2023	1.13	Design Clarification – Updated Customer Appointment Search Mockups and Description of Changes to have "-Select-" as the default selection. Updated Select Intake Appointment Mockups and Description of Changes to have "Appointment Duration" clarified. Added additional assumptions for CA-265734.	Trevor Torres

Table of Contents

1 OVERVIEW

CalSAWS currently utilizes the 9/20 version of the GEN 102 Appointment Letter. This change will update the Appointment Letter to utilize the latest state version wherever generated - from the Template Repository, from the Appointment Detail Page, or as a part of an existing packet. This change also requires the creation of a new Appointment Type – a Flexible Telephone Interview – in which the worker will call the customer (or vice versa, as indicated) during an appointment window, rather than a set time.

1.1 Current Design

The system currently uses the 09/20 version of the GEN 102 Appointment Letter.

At present, Migration Counties utilize the GEN 102 Appointment Letter for their RE Packets for CalWORKs and CalWORKs/CalFresh combo packets (CalFresh only packets use the CF 29 Appointment Letter). Los Angeles County uses the CF 29 for its packets, with different variations of the letter depending upon available customer information.

The current GEN 102 contains two sections – one for a fixed schedule phone interview, and the other for a fixed schedule face-to-face appointment. Los Angeles County currently auto-schedules its appointments with Batch Jobs PB19C902 and PB19C909 in 15-minute increments with a fixed phone interview.

At present, RE Packets are triggered for the following appointment category and sub-type combinations:

Appointment Category	Sub-Type (if applicable)
Re-Evaluation CW/CF Interview	-
RE Interview (displayed as "Re-Evaluation Interview")	-
Telephone CW/CF RE Interview*	-
General Appointment	Telephone Interview Recertification

***Note:** Los Angeles County and Migration Counties RE Appointment Scheduling batch jobs auto-schedules RE appointments with the 'General Appointment – Telephone Interview Recertification' appointment category.

The CF 386 Notice of Missed Interview (NOMI or NOMI Letter), which is triggered if a customer misses an Appointment with a 'Scheduled' status, and that appointment had any of the following category and sub-type combinations:

Appointment Category	Sub-Type (if applicable)

Intake	Intake Interview*	-
	General Appointment	Telephone Interview Intake
Recertification	Re-Evaluation CW/CF Interview*	-
	Telephone CW/CF Interview	-
	General Appointment	Telephone Interview Recertification
	General Appointment	Re-Affirmation Non-group

*Indicates a Face-to-Face appointment.

1.2 Requests

Update GEN 102 Appointment Letter to the latest State Version (1/22). Update Online pages to accommodate Flexible Block Appointments.

The current GEN 102 contains two sections – one for a fixed schedule phone interview, and the other for a fixed schedule face-to-face appointment. The new GEN 102 (1/22) adds a third section: A phone interview with a flexible window, which also indicates whether the county calls the customer or vice-versa. The Customer Appointment Detail Page currently does not have an option for a Flexible Appointment type or indicators for who calls whom – these will also be added with this SCR.

Los Angeles County currently auto-schedules its appointments with Batch Jobs PB19C902 and PB19C909 in 15-minute increments with a fixed phone interview. Update LA County's auto-scheduling jobs will instead schedule flexible phone appointments, in which the county will call the customer, in two-hour windows at the same 15-minute staggered schedule.

1.3 Overview of Recommendations

1. Online:
    a. Add a 'Flexible Block Appointment 'checkbox that dynamically reveals a 'Phone Number:' field, a 'Extension:' field, a 'Initiate Call:' dropdown field, and a 'Flexible End Time:' dropdown field to the Customer Appointment Detail and Select Intake Appointment pages.
        i. Update the Office Schedule logic to use the "Flexible End Time" instead of "Duration" when checked as "Flexible Block Appointment".
    b. Add a 'Flexible:' dropdown field to the Customer Schedule Search and the Customer Appointment Search pages in the search function.
    c. Add a column to display "Block Appt." time frames for the Customer Schedule Search, Customer Appointment Search, Appointment List, and Daily Schedule.
2. Client Correspondence: Update GEN 102 to the Latest State Version in English, Spanish, and Threshold Languages

3. Client Correspondence: Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets
4. Client Correspondence: Update LA County CW/CF/MC Packet to use the new GEN 102
5. Client Correspondence: Update LA County CW/MC Packet to use the new GEN 102
6. Batch: Update LA County Appointment Batch to Schedule Flexible Phone Appointments
7. Client Correspondence: Update NOMI Letter Generation Conditions for Packet Appointment Types
8. Self-Service Portal: Update BC Form Sender Writer batch job to insert records for CW/CF, CW/CF/MC, and CW/MC Packets
9. Self-Service Portal: Update the Form Status Batch to use the new CW/CF/MC and CW/MC packets when sending the RE information to the Self-Service portal.

1.4 Assumptions

1. The 'Suggest Times' button will follow existing functionality and only suggest times based off a "fixed appointment", even when scheduling a flexible appointment.
2. Existing variable population for the in-person and Telephone Appointments sections of the GEN 102 will remain unchanged. Fields will continue to be editable when the GEN 102 is generated via the Template Repository or Appointment Detail Page.
3. GEN 102 Generation for remaining Appointment Types not identified with this design will remain unchanged. See Supporting Documents #3 for additional information on current Appointment Category and Sub-Type information.
4. Telephone Appointment types that can be Fixed or Flexible will continue to trigger the existing CF 386 Notice of Missed Interview.
5. All existing functionalities will remain unchanged unless called out as part of this SCR.
6. For Migration Counties: When a GEN 102 is generated as a part of a packet for Telephone Interview or Re-Evaluation Interview Types, it will not be populated with Appointment Details, per existing functionality for packets without Appointment Details (established with CA-220610). Instead, the comments section will state the following: "You will get a separate letter with an interview appointment date and time. Call your worker right away if you do not get the appointment letter within 10 days of this notice. Your appointment letter will tell you if you have a phone interview or if you have to come into the office for your interview."
7. CA-250962 will add the SAWS 2 PLUS to the CW/CF RE Packet for Migration Counties.
8. The maximum duration selectable from the 'Appointment Duration' drop-down on the Appointment Details page is 5 hours. Increments will continue to be selectable in 15-minute increments.
9. If there are multiple workers selected on the Appointment Details page, the page's fields and GEN 102 Form will default to populate with the name and contact information of the worker assigned to the cash aid programs. If there are

multiple cash aid program workers selected, the information of the first selected cash aid program worker will be populated.

10. ~~No changes will be made to BenefitsCal with this SCR. The updated GEN 102 will be posted to the Self-Service Portal.~~
11. Multiple Flexible Block appointments can be booked by the worker for the same time via the online application.
12. Outlook invite functionality was added by SCR CA-207303 and only applies to appointments created from the 'Pending Assignment List' and 'Customer Appointment Detail' pages.
13. LA County batch job for auto scheduling will not use the position detail "overlapping appointment" settings for the RE appointments.
14. LA County Auto-Scheduled Appointments will only be made when the entire 2-hour duration is marked as available on the workers schedule (see supporting doc 1).
15. LA County batch will schedule appointments only during office hours as setup in the system.
16. A worker's daily threshold for appointments can be configured on the Position Detail page. This value will allow the RE Appointment batch job to schedule the number of RE appointments per day. If there is no daily threshold amount for the worker, the batch job will not have a daily scheduling limit. To configure the daily threshold amount, the following conditions must be set on the Position Detail page in the Appointment Threshold section:
    a. Category: General Appointment
    b. Type: Telephone Interview Recertification
17. Workers can indicate when they are available for appointments on the Maintain Worker Schedule tab in the Office Schedule page. This page allows workers to set their availability and blocked times such as lunch, vacation, desk time, etc.
18. The CalFresh TNB Packet does not include an Appointment Letter. Transitional CalFresh uses the CalFresh Packet.
19. Flexible Block Appointment population for the GEN 102 when generated from the Select Intake Appointment page will be done under CA-226701.
20. Changes to the Interview Type population logic for the GEN 102/CF 29 in RE Packets was made with CA-233206, release in 23.03.
21. Population logic for the 'Comments' section on the GEN 102 will be updated to additionally populate with the selected attendees with SCR CA-226701.
22. Functionality for Denial Notices after a missed interview will remain unchanged, as they check for the existence of a CF 386 NOMI letter, rather than a particular appointment type (See Recommendation 2.13).
23. PB19C902 and PB19C909 Batch job will continue to trigger existing forms and packets.
24. The CalWORKs termination and discontinuance NOA functionalities will remain unchanged.
25. Migration Counties include all counties except for Los Angeles County.
26. If any of the packets updated in this SCR are generated from the Template Repository in October for an October RE due month, then the new updated packets will generate for the user. The previous versions of the packet cannot be generated from the Template Repository.

27. If any of the packets updated in this SCR are generated from the Template Repository in October for an October RE due month, then the new updated packets will generate for the user. The previous versions of the packet cannot be generated from the Template Repository. If there is only one appointment scheduled for the time slot, the appointment will be marked as 'Single' and will show up as a black dot. If there is more than one appointment scheduled for the same time slot, the entire appointment window will be marked 'Multiple' and will show up as a red dot, regardless of whether the appointments are regular or flexible appointments scheduled manually or through batch. This is existing functionality and will not be modified as part of this SCR.
28. The display for scheduling will be adjusted to be determined based on if the "Appointment Duration" is greater or lesser than the Block Appointment time frame will be done under CA-265734.

2 RECOMMENDATIONS

2.1 Customer Appointment Detail

2.1.1 Overview

The Customer Appointment Detail page allows you to add, edit, view, reschedule, cancel, or delete a participant/beneficiary/applicant appointment. You may also generate the GEN 102 Appointment Letter form from this page. This SCR will add additional options for every "Telephone" interview – in which either the customer or the worker will call during an appointment window, rather than a set time.

2.1.2 Customer Appointment Detail Mockup

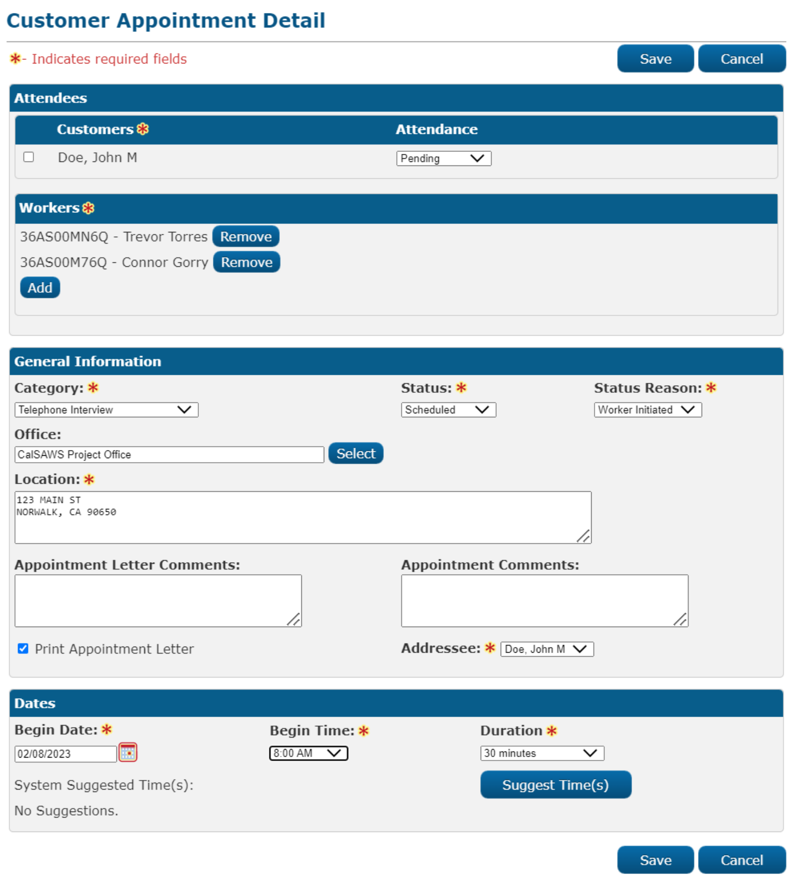


Figure 2.1.1 – Customer Appointment Detail Page Current Functionality

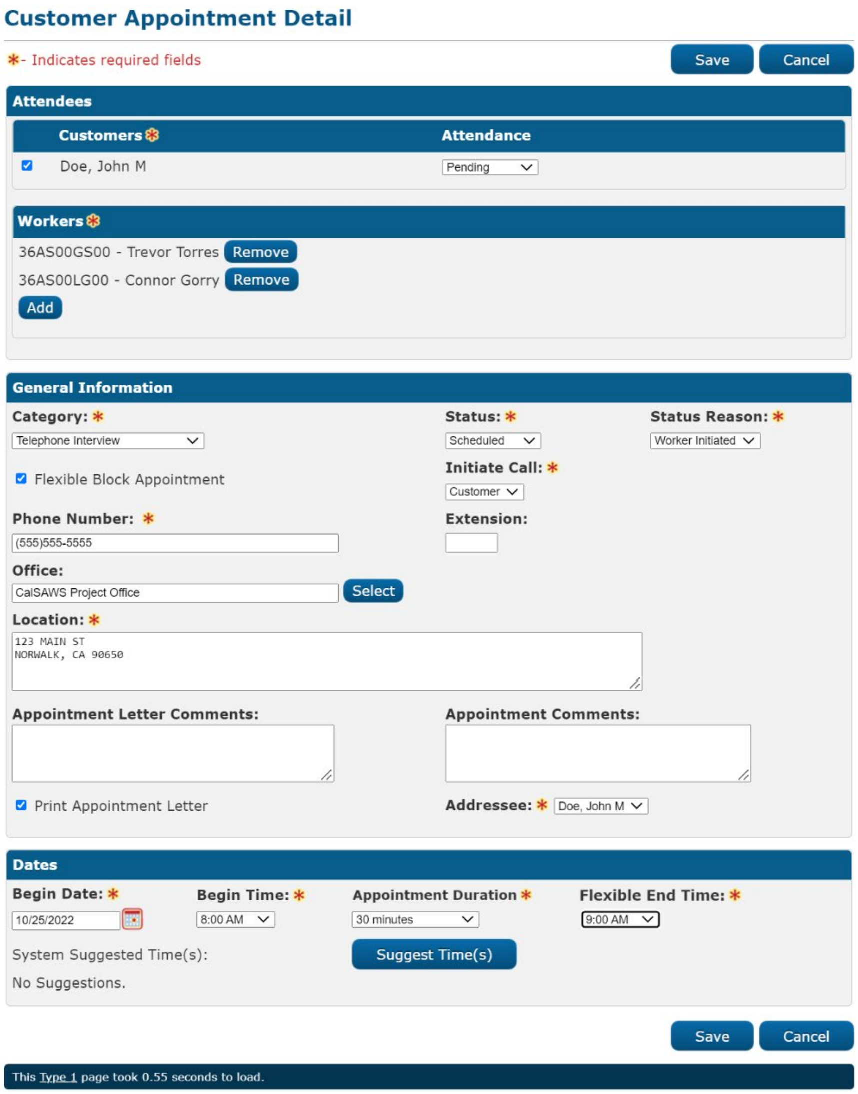


Figure 2.1.2 – Customer Appointment Detail Create Mode Mockup

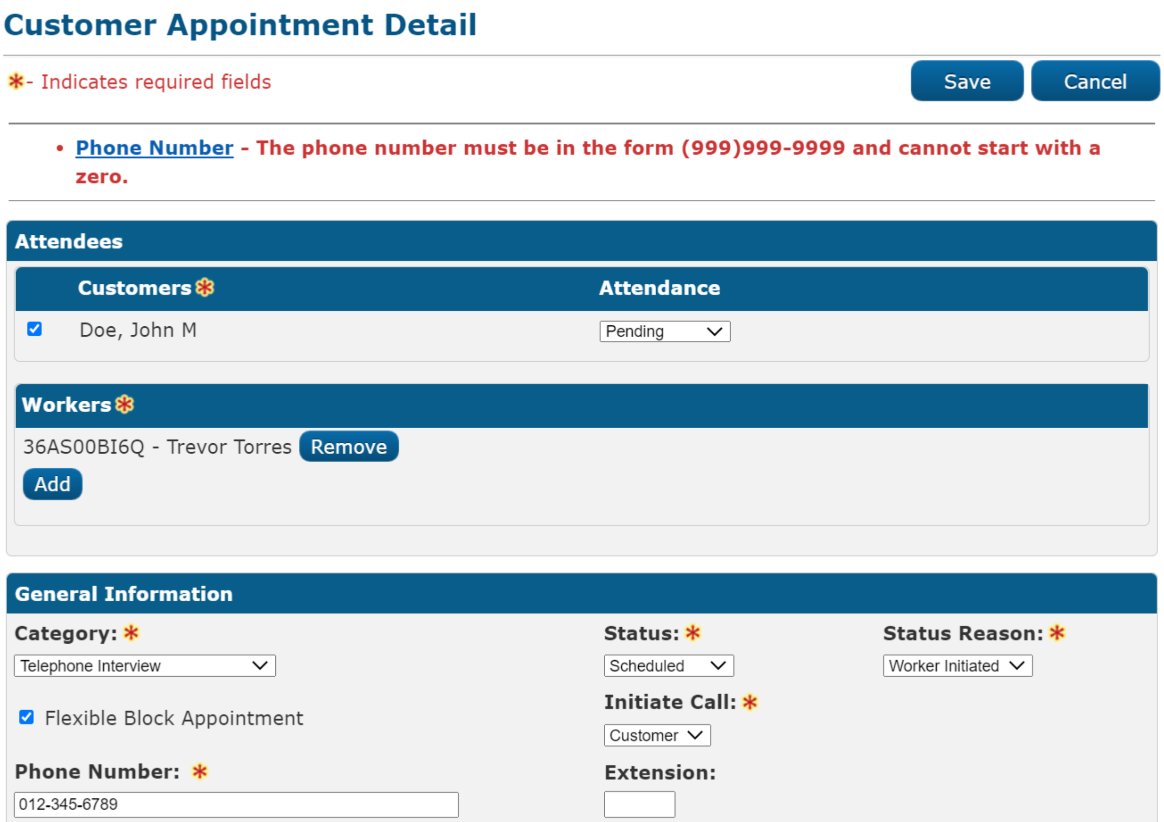


Figure 2.1.3 – Phone Number Validation Message

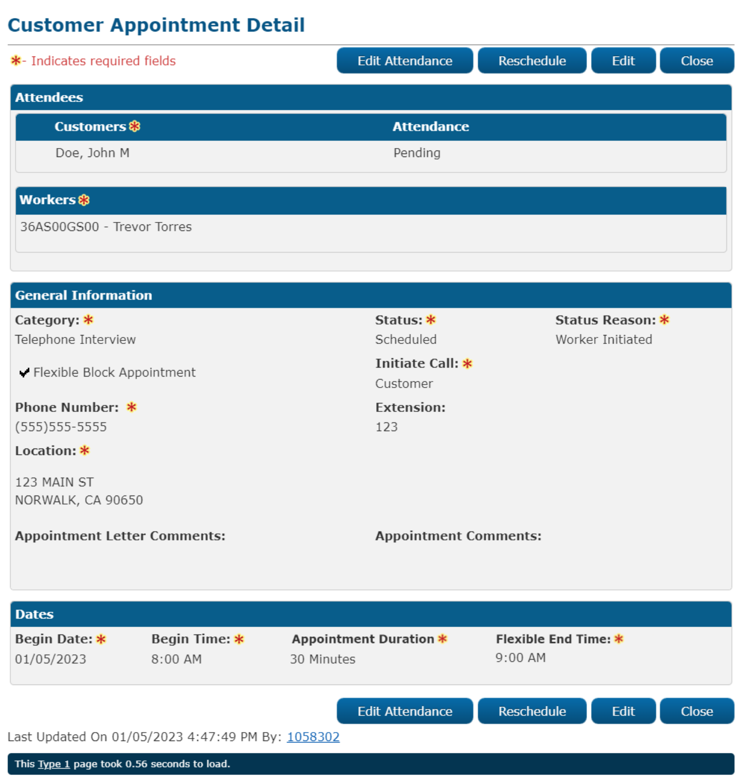


Figure 2.1.4 – Customer Appointment Detail page View Mode Mockup

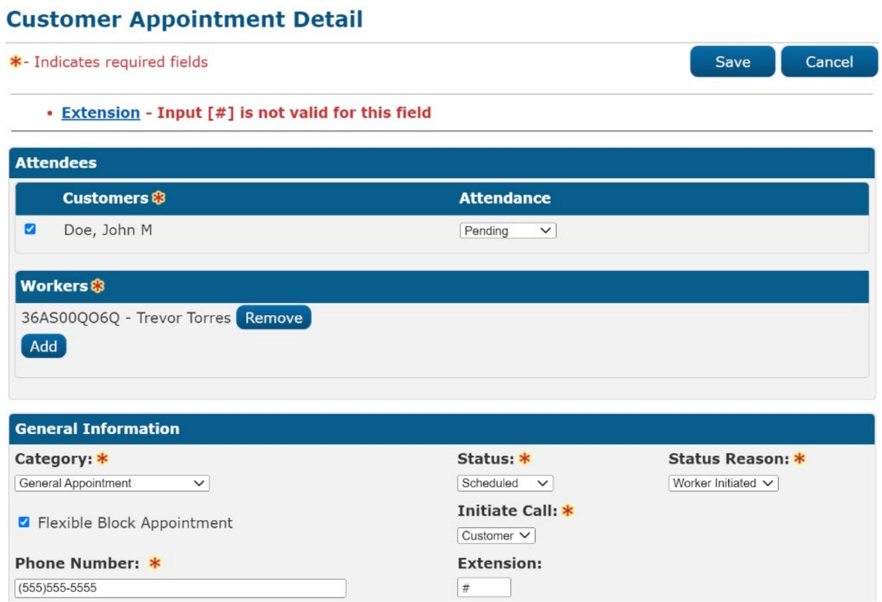


Figure 2.1.5 – Extension Validation Message (Non-Numerical)

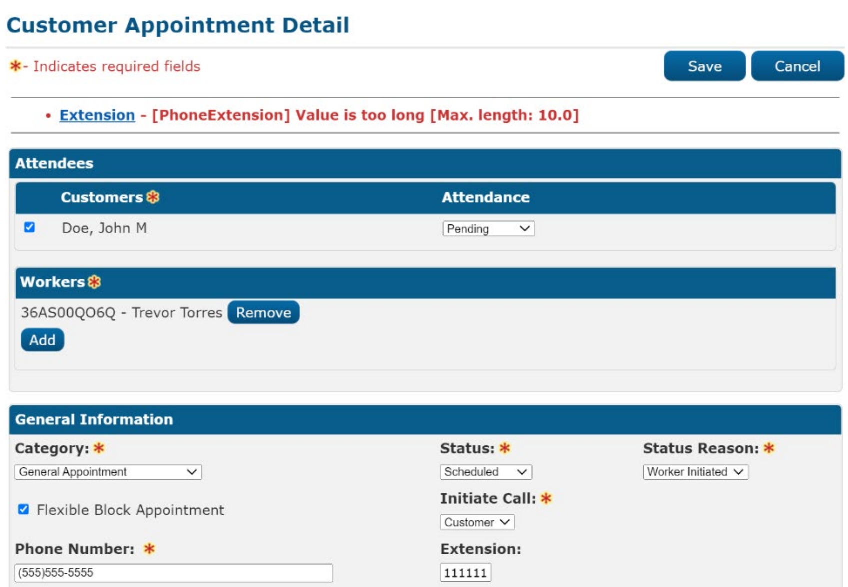


Figure 2.1.6 – Extension Validation Message (Max Limit)

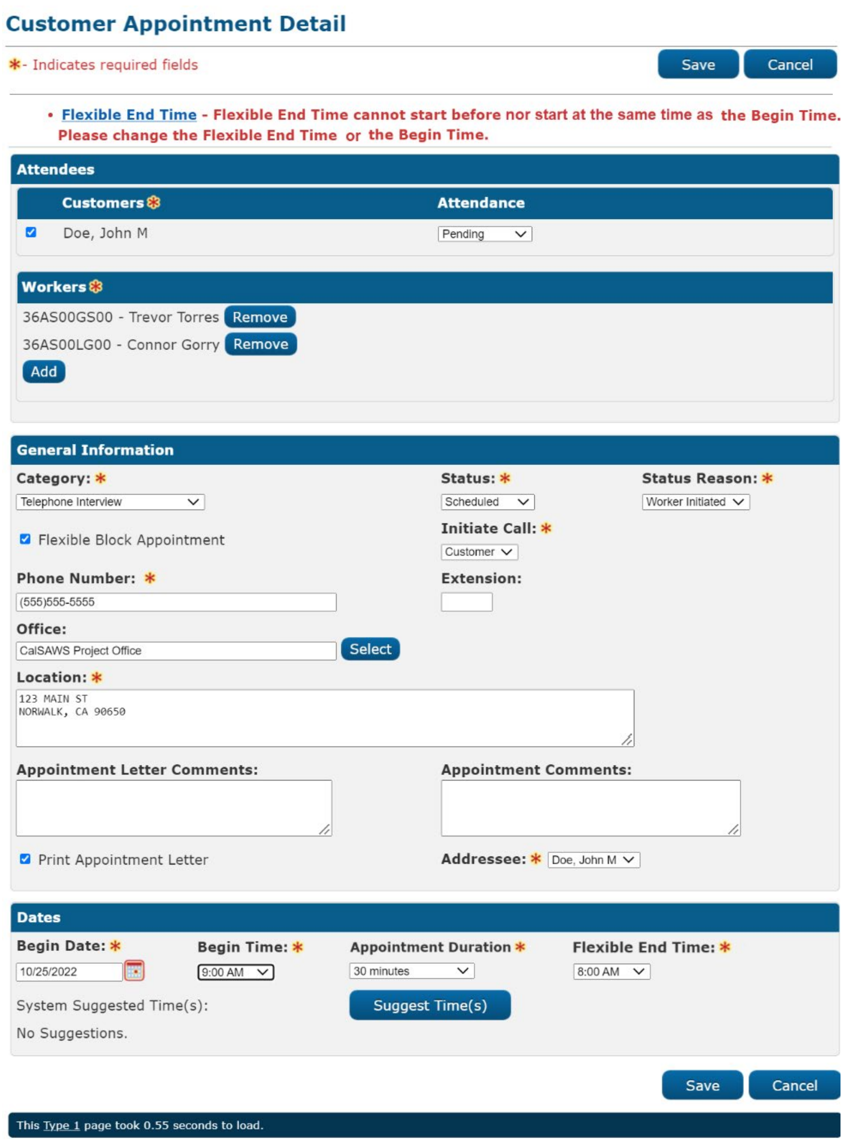


Figure 2.1.7 – Flexible End Time Validation Message

2.1.3 Description of Changes

1. Add a checkbox labeled 'Flexible Block Appointment' on the Customer Appointment Detail page in the "General Information" section, as shown in Figure 2.1.2.
    a. The checkbox can be adjusted in "Create", "Edit", and "Reschedule" mode.
        i. If the checkbox is checked, "View" mode will display a checkmark next to the checkbox but will not be editable, as shown in Figure 2.1.4.
    b. The checkbox will appear only when the "Category" field is 'Telephone Interview' or 'Telephone CW/CF RE Interview' or when the Category field is 'General Appointment' and the Appointment-Type field is '2nd Telephone Interview

Recertification', 'Telephone Interview Intake', or 'Telephone Interview Recertification'.

2. When the checkbox is selected, an 'Initiate Call:' drop-down field, a 'Phone Number:' field, and 'Extension:' field in the "General Information" section, as well as a 'Flexible End Time:' drop-down field in the 'Dates' section, will dynamically appear, as shown in Figure 2.1.2.
    a. The 'Initiate Call:' drop-down field, 'Phone Number:' field, 'Extension:' field, and 'Flexible End Time:' drop-down field can be adjusted in "Create", "Edit", and "Reschedule" mode.
        i. These values will only display in "View" mode if the "Flexible Block Appointment" is checked, as shown in Figure 2.1.4.
    b. The 'Initiate Call:' drop-down field will have 3 values: '-Select-', 'Customer', and 'Worker' in this order. "-Select-" is the default value when the page first loads.
        i. The 'Initiate Call:' drop-down field will be a required field if the 'Flexible Block Appointment' is checked.
    c. The 'Phone Number:' field will auto populate with the first Worker's phone number selected from the "Worker" section of the Customer Appointment Detail page.
        i. The 'Phone Number:' field will be a required field if the 'Flexible Block Appointment' is checked.
        ii. The 'Phone Number:' field will auto populate with the selected Worker's Main type Phone Number from the Position Detail page.
            1. If the first selected Worker has been removed and another Worker is already in the "Workers" section, the field will auto populate the next Worker's Main type Phone Number.
            2. When a Worker is removed and no other Workers is to be selected, remove the auto populated phone number from the 'Phone Number:' field.
        iii. The 'Phone Number:' field must be in the form of '(###)###-####' and cannot starts with a zero.
            1. This field will use the Phone Number validation constraint as shown in Figure 2.1.2.
                a. The validation message will display when the user clicks on the "Save" button when the field is not in the form of '(###)###-####' or starts with a zero.
                b. The validation will display the following message: "Phone Number – The phone number must be in the form of (999)999-9999 and cannot start with a zero.".
    d. The 'Extension:' field will auto populate, if applicable, with the first Worker's extension selected from the "Worker" section of the Customer Appointment Detail page.
        i. The 'Extension:' field will not be a required field.

        ii. The 'Extension:' field will auto populate, if applicable, with the selected Worker's Main type Extension from the Position Detail page.
            1. If the first selected Worker has been removed and another Worker is already in the "Workers" section, the field will auto populate the next Worker's Main type Extension, if applicable.
            2. When a Worker is removed and no other Workers are selected, remove the auto populated extension number from the 'Extension:' field.
        iii. The 'Extension:' field must be a numerical value and cannot exceed 10 numbers.
            1. This field will use the Extension validation constraints as shown in Figure 2.1.5 and Figure 2.1.6.
                a. The validation message will display when the user clicks on the "Save" button when the field exceeds 10 numbers.
                    i. The validation will display the following message: "Extension – [PhoneExtension] Value is too long [Max. length: 10.0]".
                b. The validation message will display when the user clicks on the "Save" button when the field has non-numerical values.
                    i. The validation will display the following message: "Extension – Input [] is not valid for this field.".
    e. In the "Dates" section, add another column with a dropdown field titled 'Flexible End Time:' on the Customer Appointment Detail page, as shown in Figure 2.1.2. This dropdown will determine the ending time of the block time for flexible appointments.
        i. The 'Flexible End Time:' field will be a required field if the 'Flexible Block Appointment' is checked.
        ii. The 'Flexible End Time:' drop-down field will have the same options as the "Begin Time:" drop-down field.
        iii. Create a new validation with the following message: "Flexible End Time – Flexible End Time cannot start before nor start at the same time as the Begin Time. Please change the Flexible End Time or Begin Time.", as shown in Figure 2.1.7 above.
            1. The validation message will display when the user clicks on the "Save" button when the "Flexible End Time:" has a value that is earlier than or is the same value as the "Begin Time:".

        Note: "Suggest Times" button currently uses existing functionality by using "Begin Time:" and "Appointment Duration" to suggest a worker's availability. The addition of

"Flexible End Time:" will not affect the current functionality of the "Suggest Times" button.

3. Update the "Duration" field name to "Appointment Duration" in the "Dates" section on the Customer Appointment Detail page, as shown in Figure 2.1.2.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Customer Schedule**
- **Task: Add Appointment**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Select Intake Appointment

2.2.1 Overview

The Select Intake Appointment page allows you to choose an appointment time from a list of available appointments. You may also generate the Appointment Letter form from this page. This SCR will add additional options for every "Telephone" interview – in which either the customer or the worker will call during an appointment window, rather than a set time.

2.2.2 Select Intake Appointment Mockup

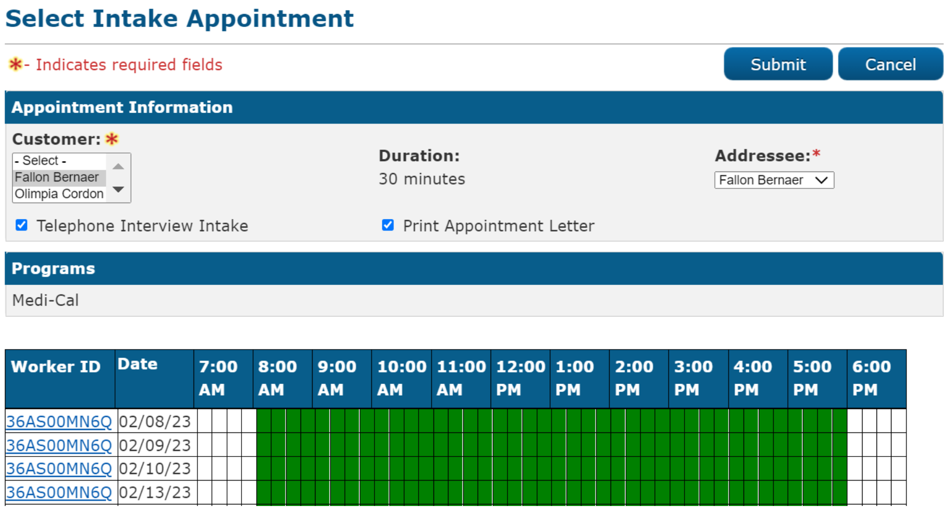


Figure 2.2.1 – Select Intake Appointment Page Current Functionality

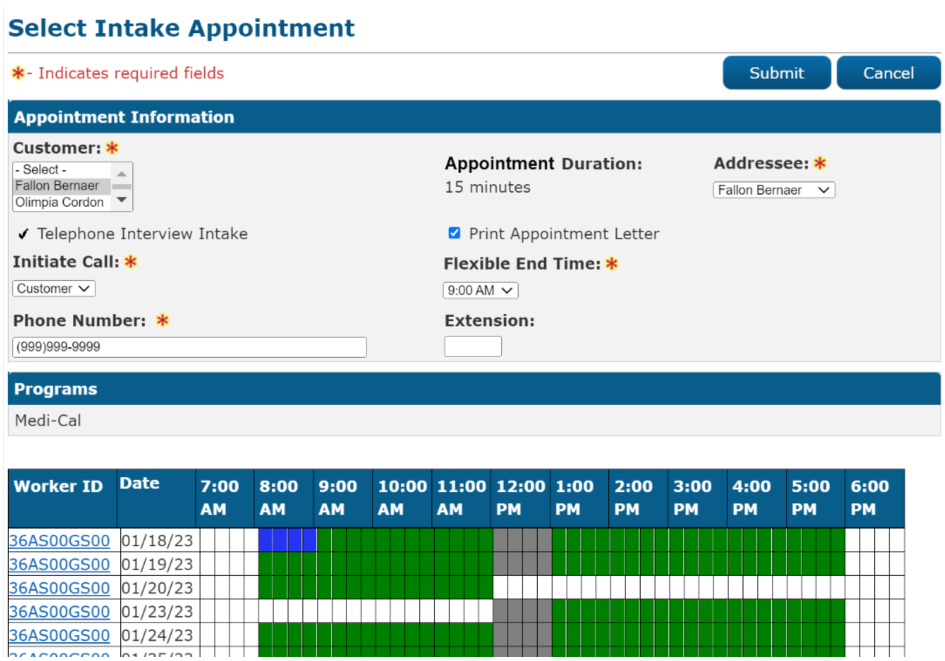


Figure 2.2.2 – Select Intake Appointment Page Mockup

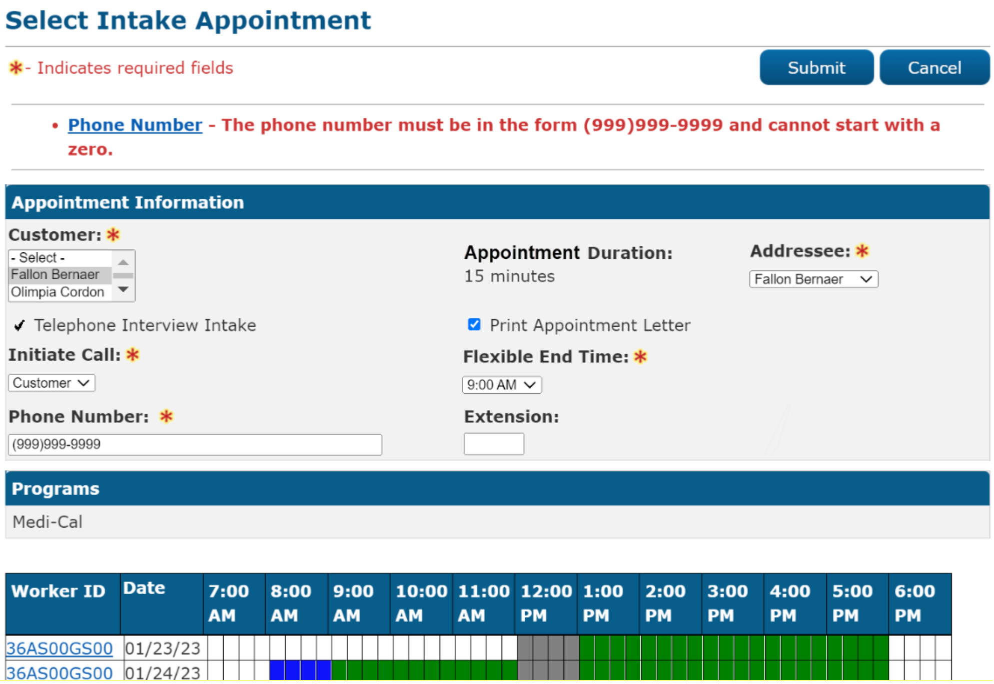


Figure 2.2.3 – Phone Number Validation Message

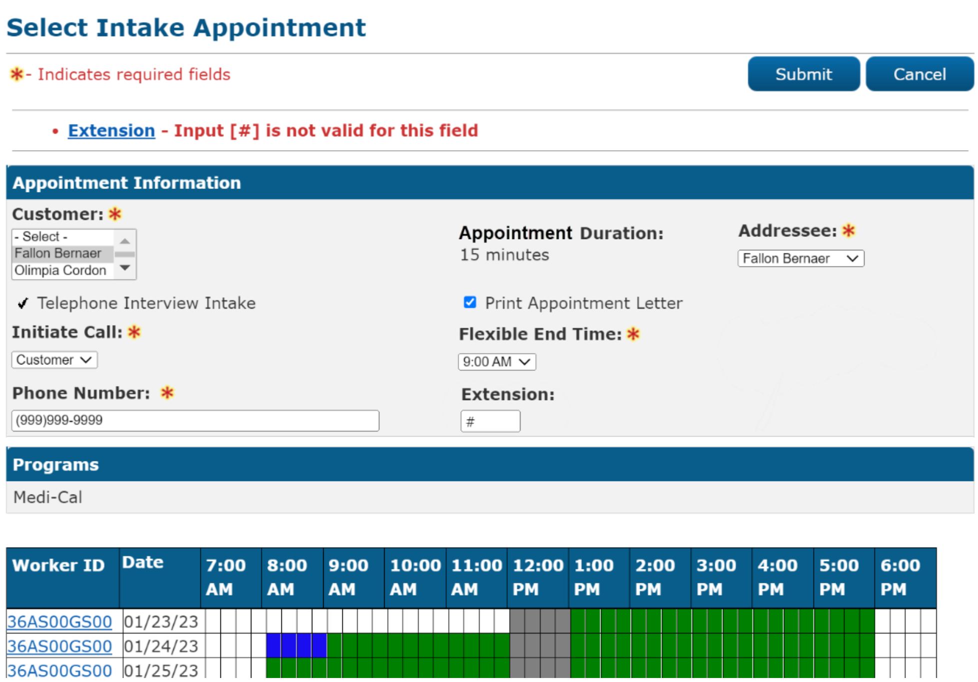


Figure 2.2.4 – Extension Validation Message (Non-Numerical)

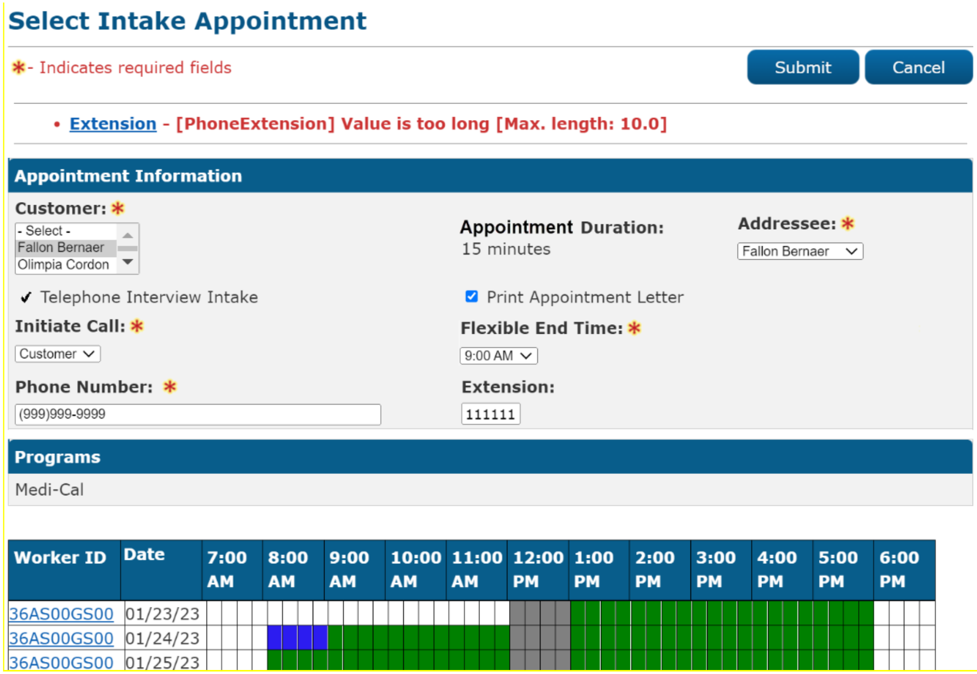


Figure 2.2.5 – Extension Validation Message (Max Limit)

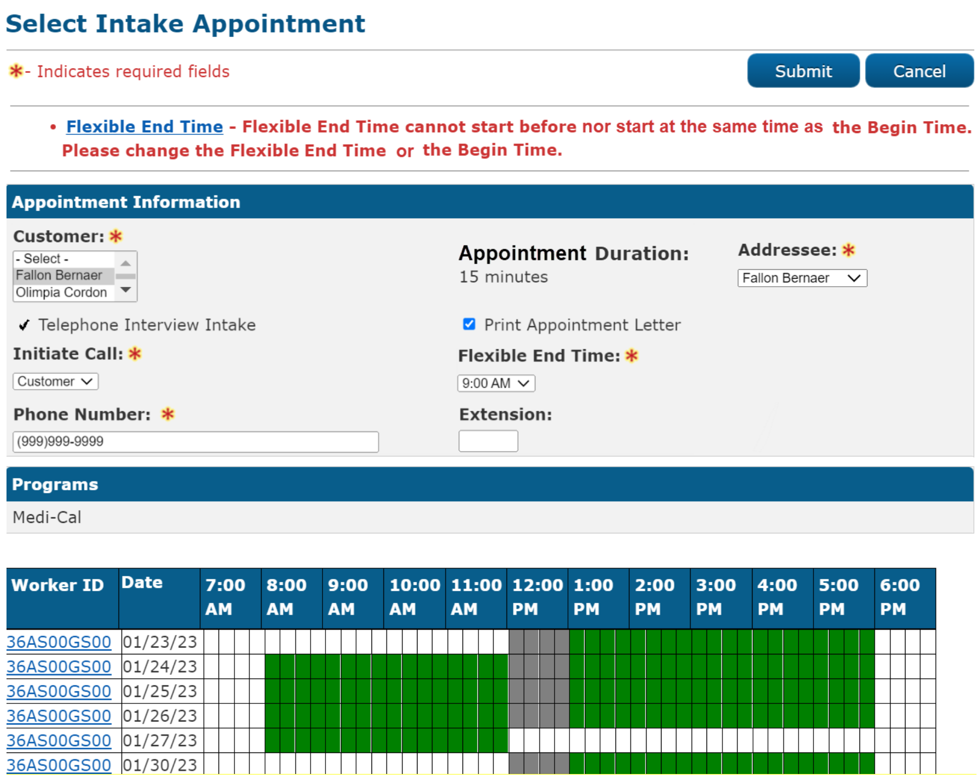


Figure 2.2.6 – Flexible End Time Validation Message

2.2.3 Description of Changes

1. Update the "Select Intake Appointment" page when a checkbox labeled 'Flexible Block Appointment' from the "Pending Assignment List" page is selected to be shown as in Figure 2.2.2.
    a. When the checkbox is selected from the "Pending Assignment List" page, the field "Telephone Interview Intake" will be selected automatically and display a checkmark next to it but will not be editable.
    b. The 'Flexible End Time' field will be used to determine the end time for displaying the dots on the schedule instead using the time of 'Appointment Duration'.
    c. The 'Initiate Call:' drop-down field will have 3 values: '-Select-', 'Customer', and 'Worker' in this order. "-Select-" is the default value when the page first loads.
        i. The 'Initiate Call:' drop-down field will be a required field if the 'Flexible Block Appointment' is checked from the "Pending Assignment List" page.
    d. The 'Phone Number:' field will auto populate with the first Worker's phone number selected from the "Worker" section of the Select Intake Appointment page.
        i. The 'Phone Number:' field will be a required field if the 'Flexible Block Appointment' is checked from the "Pending Assignment List" page.
        ii. The 'Phone Number:' field will auto populate with the selected Worker's Main type Phone Number from the Position Detail page.
        iii. The 'Phone Number:' field must be in the form of '(###)###-####' and cannot starts with a zero.
            1. This field will use the Phone Number validation constraint as shown in Figure 2.2.3.
                a. The validation message will display when the user clicks on the "Save" button when the field is not in the form of '(###)###-####' or starts with a zero.
                b. The validation will display the following message: "Phone Number – The phone number must be in the form of (999)999-9999 and cannot start with a zero.".
    e. The 'Extension:' field will auto populate, if applicable, with the first Worker's extension selected from the "Worker" section of the Select Intake Appointment page.
        i. The 'Extension:' field will not be a required field.
        ii. The 'Extension:' field will auto populate, if applicable, with the selected Worker's Main type Extension from the Position Detail page.
        iii. The 'Extension:' field must be a numerical value and cannot exceed 10 numbers.

1. This field will use the Extension validation constraints as shown in Figure 2.2.4 and Figure 2.2.5.
    a. The validation message will display when the user clicks on the "Save" button when the field exceeds 10 numbers.
        i. The validation will display the following message: "Extension – [PhoneExtension] Value is too long [Max. length: 10.0]".
    b. The validation message will display when the user clicks on the "Save" button when the field has non-numerical values.
        i. The validation will display the following message: "Extension – Input [] is not valid for this field.".

f. The 'Flexible End Time:' drop-down field will determine the ending time of the block time for flexible appointments.
    i. The 'Flexible End Time:' field will be a required field if the 'Flexible Block Appointment' is checked from the "Pending Assignment List" page.
        1. Until a value, other than "-Select-", is selected for this field, the schedule for selecting the "Begin Time" will not appear.
            a. If the value is changed back to "-Select-", the schedule will be hidden until a different value is selected.
        2. If the "Flexible End Time" value is changed after a "Begin Time" value is selected (the earliest selected radio on the Intake Appointment), update the selection dynamically on the schedule (represented by blue squares) to match the changed "Flexible End Time" value.
        3. If the "Flexible End Time" value is before or the same as the "Begin Time" value, do not display the selection on the schedule (represented by blue squares).
    ii. The 'Flexible End Time:' drop-down field options will have values in 15-minute increments, starting from "7:15 AM" and ending to "7:00 PM".
    iii. Create a new validation with the following message: "Flexible End Time – Flexible End Time cannot start before nor start at the same time as the Begin Time. Please change the Flexible End Time or Begin Time.", as shown in Figure 2.2.6 above.
        1. The validation message will display when the user clicks on the "Submit" button when the "Flexible End Time:" has a value that is earlier than or is the same

value as the earliest selected radio on the Intake Appointment.

2. If the “Flexible Block Appointment” checkbox is selected from the “Pending Assignment List” page, then the Select Intake Appointment page will update to allow the selection of every radio option on the schedule, regardless of if there is an appointment already scheduled.
    a. This will also allow any Flexible Appointment to overlap any other already scheduled Fixed and/or Flexible appointment(s).

3. If the “Flexible Block Appointment” is not selected from the “Pending Assignment List” page, then existing functionality will still apply for the Select Intake Appointment page.

4. When the “Cancel” button is used, it will take the user to the “Pending Assignment List” page.

5. Update the “Duration” field name to “Appointment Duration” in the “Dates” section on the Select Intake Appointment page, as shown in Figure 2.2.2.

2.2.4 Page Location

- **Global: Case Info**
- **Local: Worker Assignment**
- **Task: Assign**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.2.7 Page Usage/Data Volume Impacts

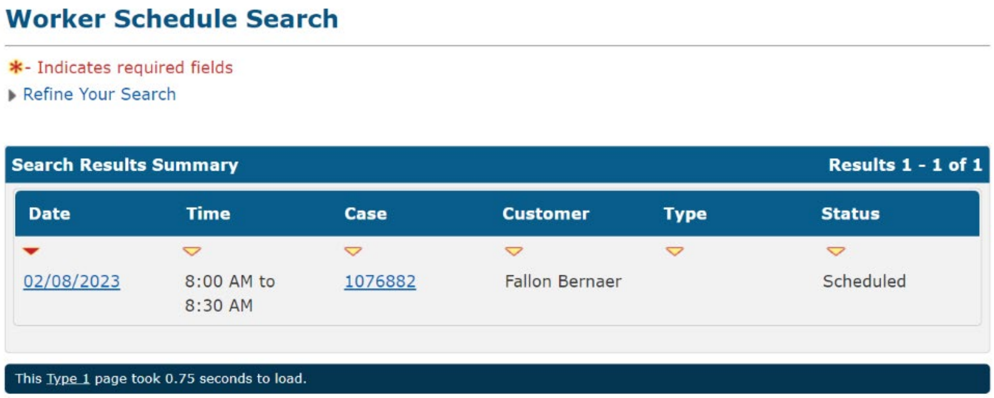
N/A

2.3 Worker Schedule Search

2.3.1 Overview

The Worker Schedule Search page allows you to access a worker’s existing appointments for a specified time period. This SCR will adjust the name of a variable and add an additional column to include flexible appointment times.

2.3.2 Worker Schedule Search Mockup



Worker Schedule Search

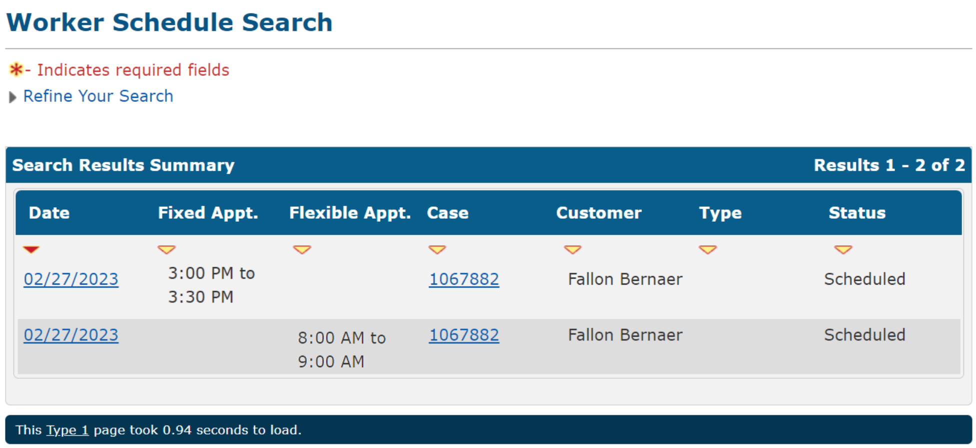
*- Indicates required fields

Refine Your Search

Search Results Summary					Results 1 - 1 of 1
Date	**Time**	**Case**	**Customer**	**Type**	**Status**
02/08/2023	8:00 AM to 8:30 AM	1076882	Fallon Bernaer		Scheduled

This Type 1 page took 0.75 seconds to load.

Figure 2.3.1 – Worker Schedule Search Page Current Functionality



Worker Schedule Search

*- Indicates required fields

Refine Your Search

Search Results Summary						Results 1 - 2 of 2
Date	**Fixed Appt.**	**Flexible Appt.**	**Case**	**Customer**	**Type**	**Status**
02/27/2023	3:00 PM to 3:30 PM		1067882	Fallon Bernaer		Scheduled
02/27/2023		8:00 AM to 9:00 AM	1067882	Fallon Bernaer		Scheduled

This Type 1 page took 0.94 seconds to load.

Figure 2.3.2 – Worker Schedule Search Page Mockup

2.3.3 Description of Changes

1. Update the name of "Time" to "Fixed Appt.", as shown in Figure 2.3.2.
    a. If the appointment is not a "Flexible Block Appointment" when created from the Customer Appointment Detail and Select Intake Appointment pages, then the "Fixed Appt." field on this page will populate with the time frame of the duration of the appointment.
        i. Otherwise, if the appointment is a Flexible Block Appointment, then no time frame will populate under "Fixed Appt.".
    b. Current sorting functionality when using this column will rearrange the records by earliest "Begin Time".
        i. If there are multiple records with the same "Begin Time", then the sorting functionality will sort the earliest "Begin Time" records by the earliest "End Time".

Note: When sorting by other columns (besides "Fixed Appt." and "Block Appt."), the "Fixed Appt." column should have priority for sorting.

2. Add an additional column between "Fixed Appt." and "Case" labeled "Block Appt." to include the flexible appointment times, as shown in Figure 2.3.2.
   a. If the appointment is a "Flexible Block Appointment" when created from the Customer Appointment Detail and Select Intake Appointment pages, then the "Block Appt." field on this page will populate with the time frame of the block duration of the flexible appointment.
      i. Otherwise, if the appointment is not a Flexible Block Appointment, then no time frame will populate under "Block Appt.".
   b. The sorting functionality when using this column will rearrange the records by earliest "Begin Time".
      i. If there are multiple records with the same "Begin Time", then the sorting functionality will sort the earliest "Begin Time" records by the earliest "Flexible End Time".

Note: When sorting by other columns (besides "Fixed Appt." and "Block Appt."), the "Fixed Appt." column should have priority for sorting.

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Worker Schedule**
- **Task: Search**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Customer Schedule Search

2.4.1 Overview

The Customer Schedule Search page allows you to search and view a participant/beneficiary's appointments. This SCR will add an additional dropdown in the "Refining Your Search" section, update to the name of a field, and an additional column to include flexible appointment times.

2.4.2 Customer Schedule Search Mockup

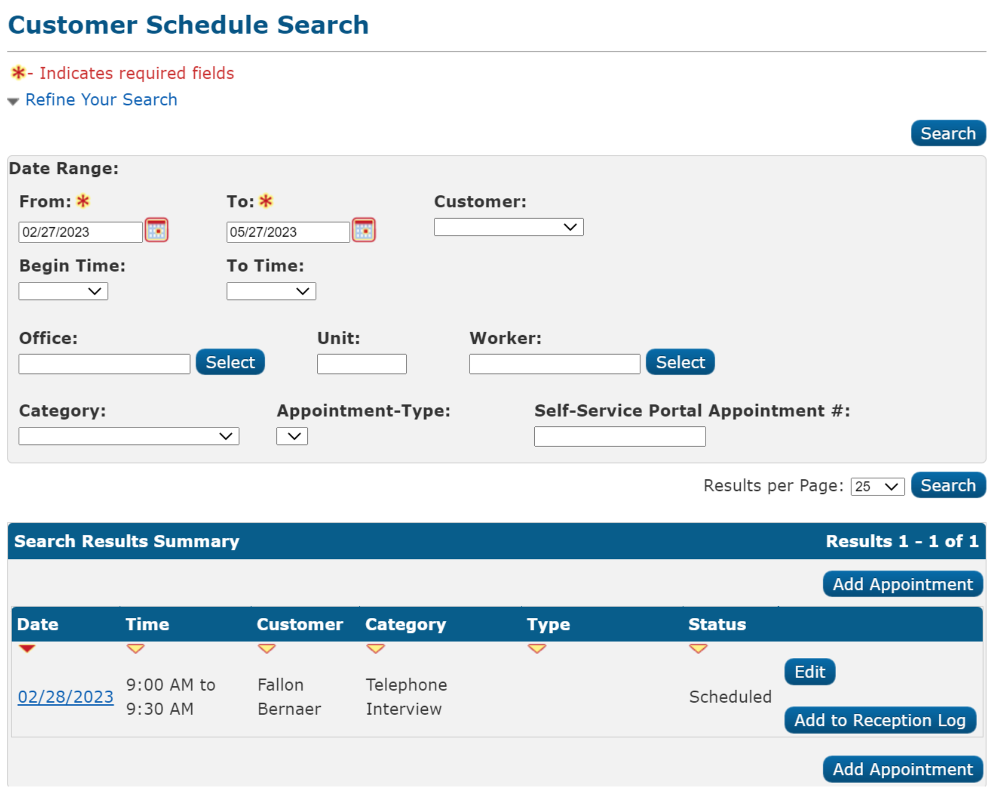


Figure 2.4.1 – Customer Schedule Search Page Current Functionality

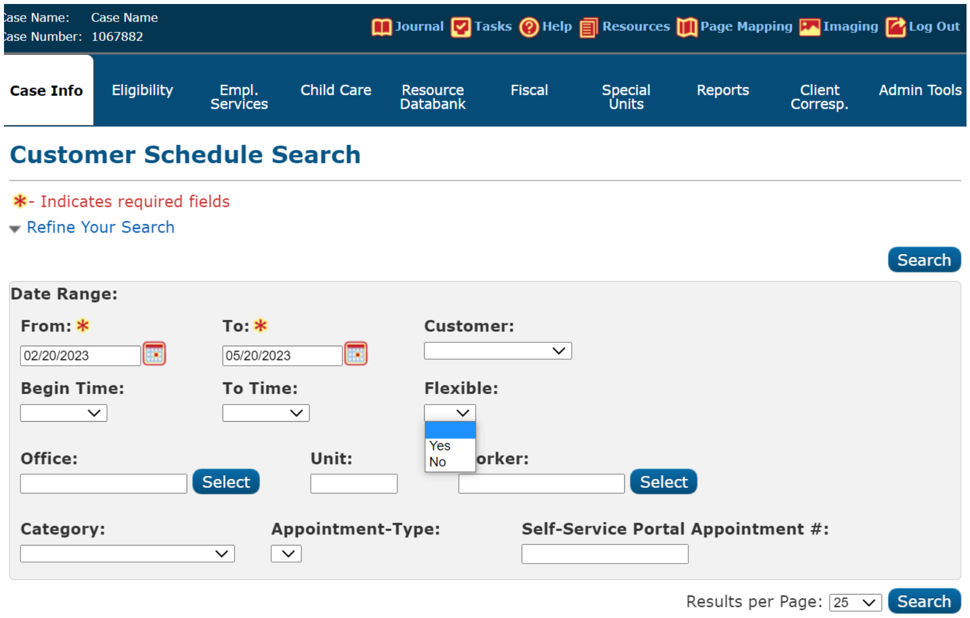


Figure 2.4.2 – Customer Schedule Search Page Mockup Search Options

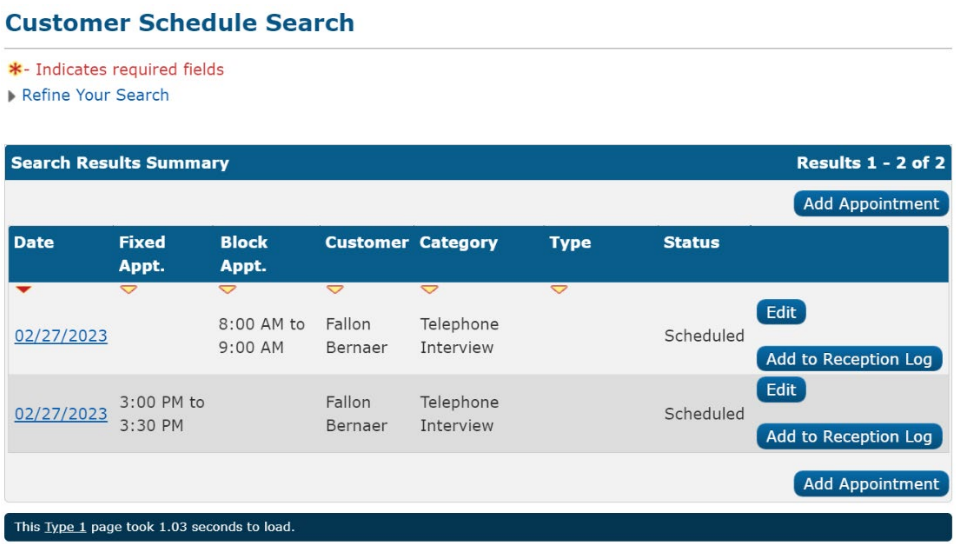


Figure 2.4.3 – Customer Schedule Search Page Mockup

2.4.3 Description of Changes

1. Add a dropdown option labeled "Flexible:" in the "Refine Your Search" section that searches for appointments that are Flexible or Non-Flexible depending on which value is selected, as shown in Figure 2.4.2.
    a. The "Flexible:" field will not be required.
    b. The field will have 3 values: " ", "Yes", and "No" in this order. " " is the default value when the page first loads.
    c. If the " " value is selected, display both Flexible and Non-Flexible Appointments.
2. Update the name of "Time" to "Fixed Appt.", as shown in Figure 2.4.3.

a. If the appointment is not a “Flexible Block Appointment” when created from the Customer Appointment Detail and Select Intake Appointment pages, then the “Fixed Appt.” field on this page will populate with the time frame of the duration of the appointment.
    i. Otherwise, if the appointment is a Flexible Block Appointment, then no time frame will populate under “Fixed Appt.”.
b. Current sorting functionality when using this column will rearrange the records by earliest “Begin Time”.
    i. If there are multiple records with the same “Begin Time”, then the sorting functionality will sort the earliest “Begin Time” records by the earliest “End Time”.

Note: When sorting by other columns (besides “Fixed Appt.” and “Block Appt.”), the “Fixed Appt.” column should have priority for sorting.

3. Add an additional column between “Fixed Appt.” and “Case” labeled “Block Appt.” to include the flexible appointment times, as shown in Figure 2.4.3.
    a. If the appointment is a “Flexible Block Appointment” when created from the Customer Appointment Detail and Select Intake Appointment pages, then the “Block Appt.” field on this page will populate with the time frame of the block duration of the flexible appointment.
        i. Otherwise, if the appointment is not a Flexible Block Appointment, then no time frame will populate under “Block Appt.”.
    b. The sorting functionality when using this column will rearrange the records by earliest “Begin Time”.
        i. If there are multiple records with the same “Begin Time”, then the sorting functionality will sort the earliest “Begin Time” records by the earliest “Flexible End Time”.

Note: When sorting by other columns (besides “Fixed Appt.” and “Block Appt.”), the “Fixed Appt.” column should have priority for sorting.

2.4.4 Page Location

- **Global: Case Info**
- **Local: Customer Schedule**
- **Task: Search**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Customer Appointment Search

2.5.1 Overview

The Customer Appointment Search page allows you to search and view a participant/beneficiary's appointments. This SCR will add an additional dropdown that will search for appointments that are Flexible and Non-Flexible.

2.5.2 Customer Appointment Search Mockup

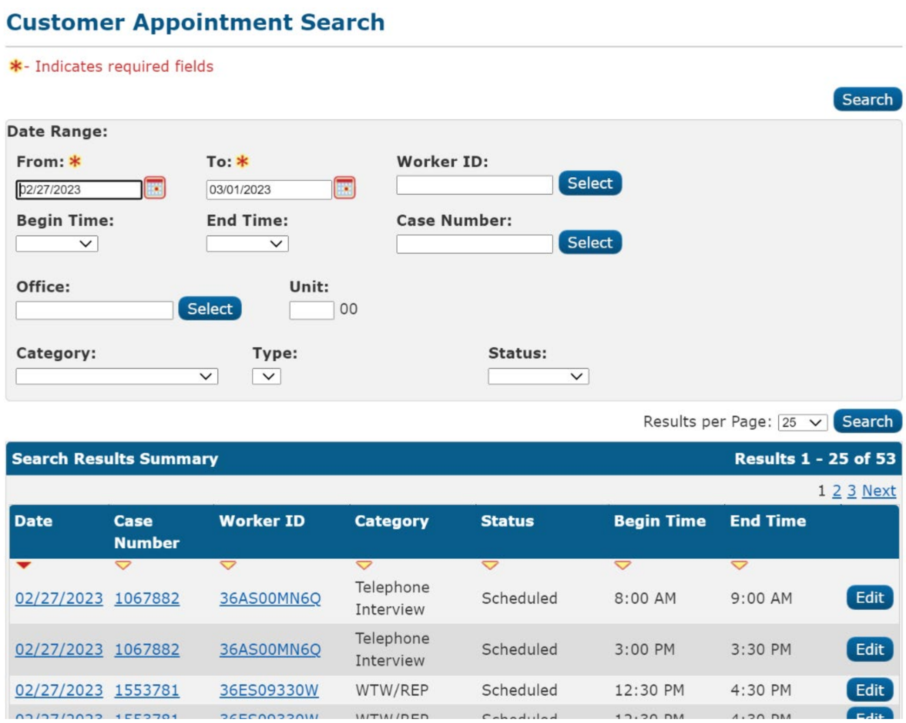


Figure 2.5.1 – Customer Appointment Search Page Current Functionality

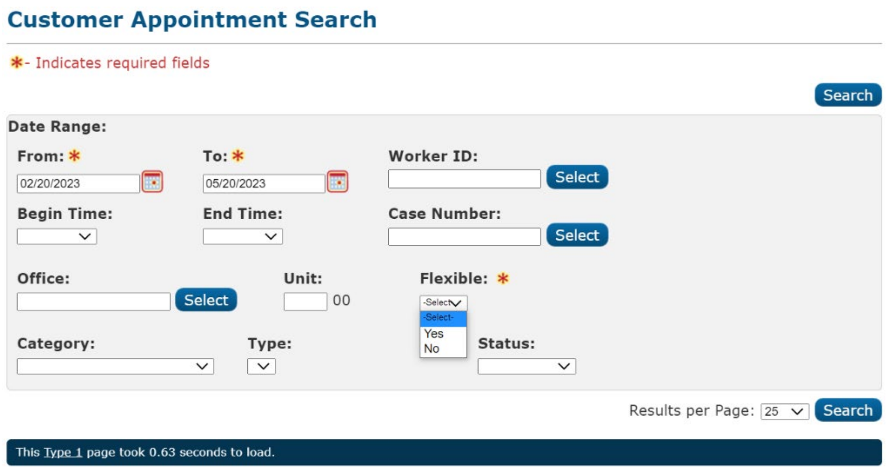


Figure 2.5.2 – Customer Appointment Search Page Mockup Search Options

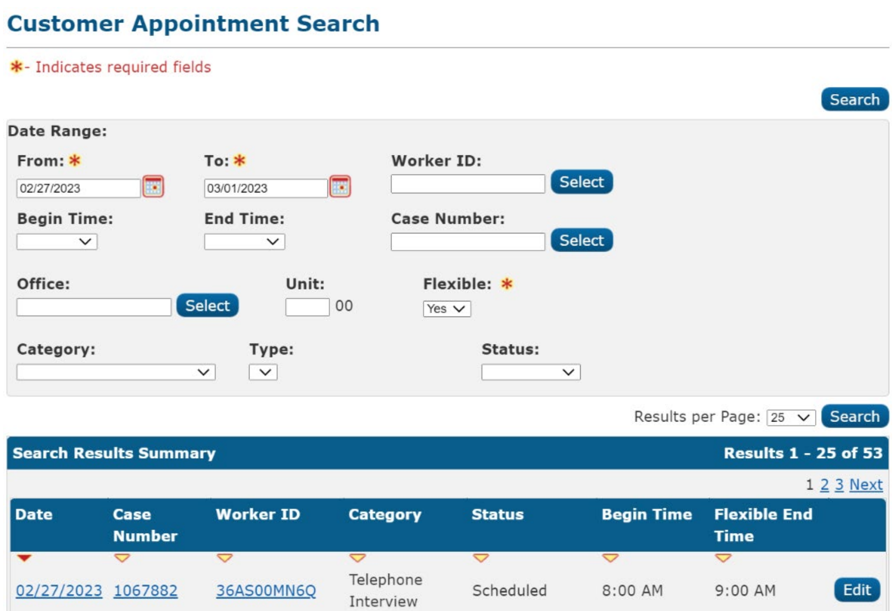


Figure 2.5.3 – Customer Appointment Search Page Flexible Example

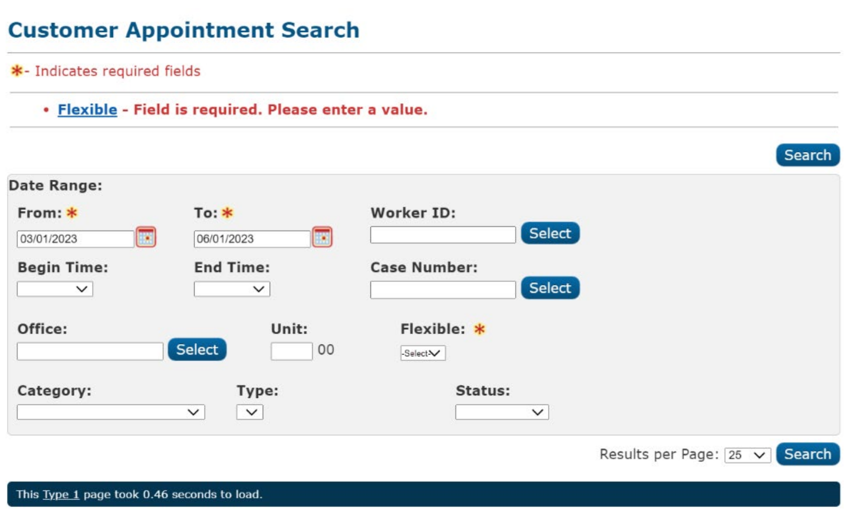


Figure 2.5.4 – Customer Appointment Search Page Validation

2.5.3 Description of Changes

1. Add a dropdown labeled "Flexible:" that searches for appointments that are Flexible or Non-Flexible depending on which value is selected, as shown in Figure 2.5.2.
    a. The "Flexible:" field will be required.
    b. The 'Flexible:' drop-down field will have 3 values: "-Select-", 'Yes', and 'No' in this order. " " is the default value when the page first loads.
    c. This field will use the Flexible validation constraint as shown in Figure 2.5.4.
        i. The validation message will display when the user clicks on the "Search" button when the field does not have "Yes" or "No" selected.
        ii. The validation will display the following message: "Flexible - Field is required. Please enter a value".
2. If the value in "Flexible:" is "Yes", dynamically change the name of the "End Time" field to "Flexible End Time", as shown in Figure 2.5.3.
    a. This field will populate with the Flexible End Time value from the Customer Appointment Detail and Select Intake Appointment pages.
        i. The sorting functionality when using this column will rearrange the records by earliest "Flexible End Time".
            1. If there are multiple records with the same "Flexible End Time", then the sorting functionality will sort the earliest "Flexible End Time" records by the earliest "Begin Time".
3. Current sorting functionality when using the "Begin Time" column rearranges the records by earliest "Begin Time".
    a. If there are multiple records with the same "Begin Time" and "Flexible" is "Yes", then the sorting functionality will sort the earliest "Begin Time" records by the earliest "Flexible End Time".
4. If the value in "Flexible:" is "No", do not change the name of "End Time" field.

2.5.4 Page Location

- **Global: Admin Tools**
- **Local: Worker Schedule**
- **Task: Customer Appointment Search**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Appointment List

2.6.1 Overview

The Appointment List page allows you to view appointments of a worker. This SCR will update to the name of a field and add an additional column to include flexible appointment times.

2.6.2 Appointment List Mockup

Figure 2.6.1 – Appointment List Page Current Functionality

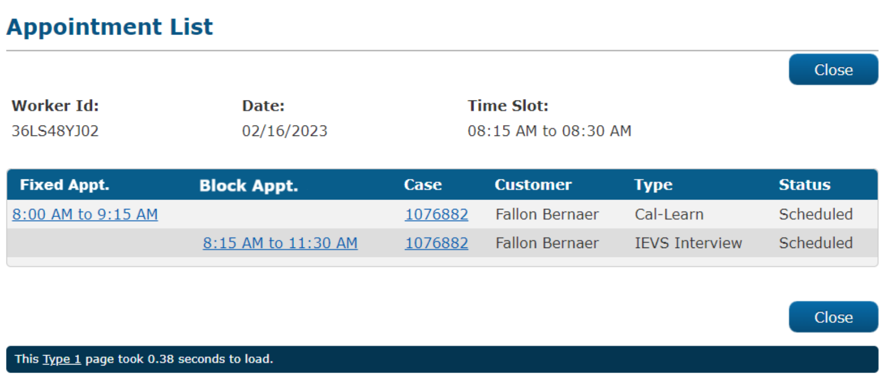


Figure 2.6.2 – Appointment List Page Mockup

2.6.3 Description of Changes

1. Update the name of "Time" to "Fixed Appt.", as shown in Figure 2.6.2.
    a. If the appointment is not a "Flexible Block Appointment" when created from the Customer Appointment Detail and Select Intake Appointment pages, then the "Fixed Appt." field on this page will populate with the time frame of the duration of the appointment.
        i. Otherwise, if the appointment is a Flexible Block Appointment, then no time frame will populate under "Fixed Appt.".
2. Add an additional column between "Fixed Appt." and "Case" labeled "Block Appt." to include the flexible appointment times, as shown in Figure 2.6.2.
    a. If the appointment is a "Flexible Block Appointment" when created from the Customer Appointment Detail and Select Intake Appointment pages, then the "Block Appt." field on this page will populate with the time frame of the block duration of the flexible appointment.
        i. Otherwise, if the appointment is not a Flexible Block Appointment, then no time frame will populate under "Block Appt.".

2.6.4 Page Location

- **Global: Admin Tools**
- **Local: Office Schedule**
- **Task: Overlapping Appointments**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Daily Schedule

2.7.1 Overview

The Daily Schedule page allows you to access a Worker's schedule for the day. This SCR will update to the name of a field and add an additional column to include flexible appointment times.

2.7.2 Daily Schedule Mockup

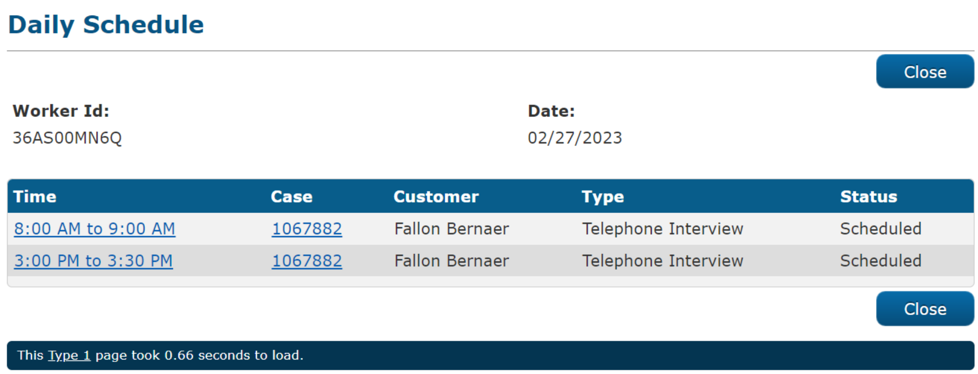


Figure 2.7.1 – Daily Schedule Page Current Functionality

Figure 2.7.2 – Daily Schedule Page Mockup

2.7.3 Description of Changes

1. Update the name of "Time" to "Fixed Appt.", as shown in Figure 2.7.2.
    a. If the appointment is not a "Flexible Block Appointment" when created from the Customer Appointment Detail and Select Intake Appointment pages, then the "Fixed Appt." field on this page will populate with the time frame of the duration of the appointment.
        i. Otherwise, if the appointment is a Flexible Block Appointment, then no time frame will populate under "Fixed Appt.".

2. Add an additional column between “Fixed Appt.” and “Case” labeled “Block Appt.” to include the flexible appointment times, as shown in Figure 2.7.2.
    a. If the appointment is a “Flexible Block Appointment” when created from the Customer Appointment Detail and Select Intake Appointment pages, then the “Block Appt.” field on this page will populate with the time frame of the block duration of the flexible appointment.
        i. Otherwise, if the appointment is not a Flexible Block Appointment, then no time frame will populate under “Block Appt.”.

2.7.4 Page Location

- **Global: Admin Tools**
- **Local: Office Schedule**
- **Task: Worker ID**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Pending Assignment List

2.8.1 Overview

The Pending Assignment List page allows you to access and assign all unassigned programs on a case to a worker. This page is before the “Select Intake Appointment” page. This SCR will add the option for a Flexible Block Appointment that will update the “Select Intake Appointment” page and update the name of the “Duration” field to “Appointment Duration”.

2.8.2 Pending Assignment List Mockup

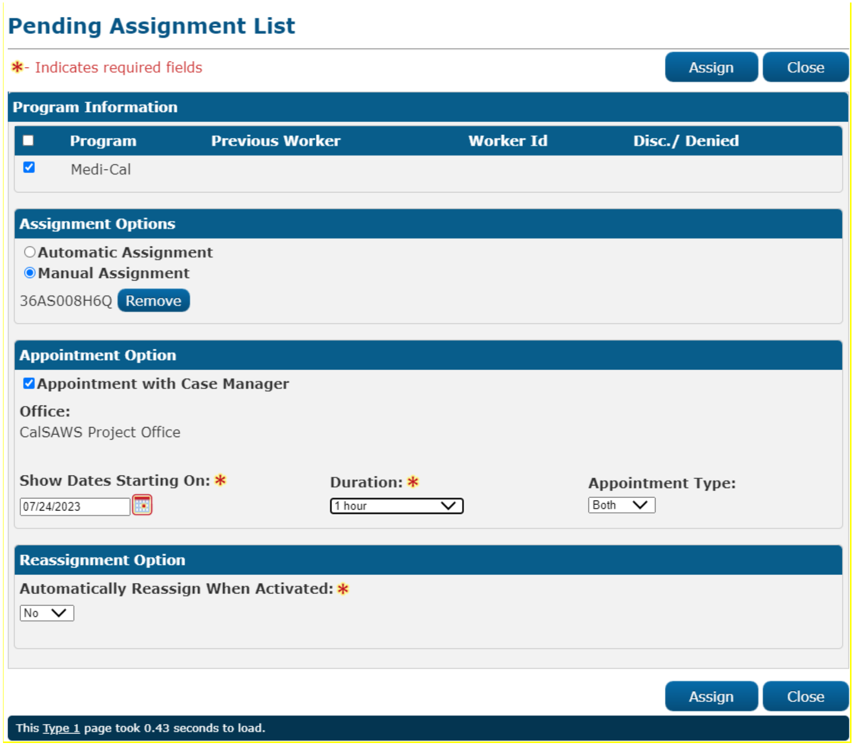


Figure 2.8.1 - Pending Assignment List Page Current Functionality

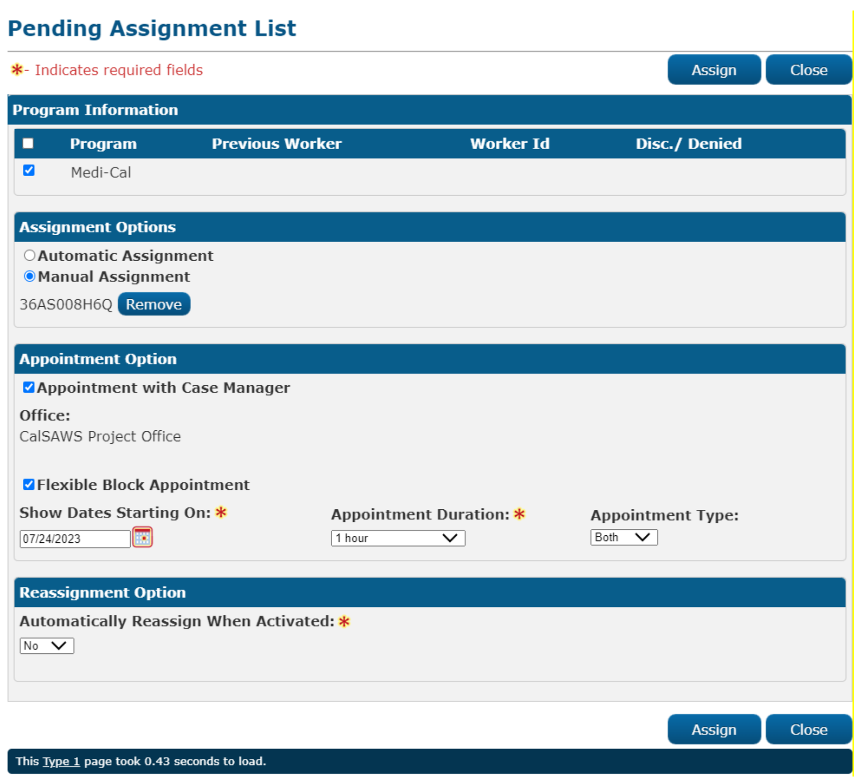


Figure 2.8.2 – Pending Assignment List Mockup

2.8.3 Description of Changes

1. Add a checkbox labeled 'Flexible Block Appointment' on the Pending Assignment List page that dynamically appears in the "Appointment Option" section when the "Appointment with Case Manager" Checkbox is selected, as shown in Figure 2.8.2.
2. When the checkbox is selected, the "Select Intake Appointment" page will be updated.
   a. See Section 2.2 for more information.
3. Update the "Duration" field name to "Appointment Duration" in the "Appointment Option" section, as shown in Figure 2.8.2.

2.8.4 Page Location

- **Global: Case Info**
- **Local: Worker Assignment**
- **Task: Appointment Option**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

Update Page Mapping to accommodate the new fields/updated being done to the page.

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Update GEN 102 to the latest state version

2.9.1 Overview

Update the GEN 102 Appointment Letter to the latest state version. The new 1/22 version of the Appointment Letter includes an additional section for a Flexible Phone Interview. Recommendation 2.1 updates the Appointment Detail Page to accommodate this new scheduling option, and this recommendation will populate the GEN 102 with this new data.

State Forms: GEN 102

Programs: Multiple

Attached Forms: N/A

Forms Category: Forms

Editable: Yes

Visibility: All Counties

Current Languages (13)**:** English, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog, Hmong, Korean, Lao, Russian, Spanish, Vietnamese

2.9.2 Update GEN 102 Form Verbiage

Update GEN 102 Form XDP

Update XDP for the GEN 102 (1/22) Form. The updated GEN 102 contains a new table – in addition to its existing tables for In-Person and Telephone Appointments – which represents Flexible Telephone Appointments, that take place in a window rather than a set time.

Form Header: CalSAWS Standard Header 1

Form Title: Appointment Letter

Form Number: GEN 102

Include NA Back 9: No

Imaging Form Name: Appointment Letter

Imaging Document Type: Appointment Letter

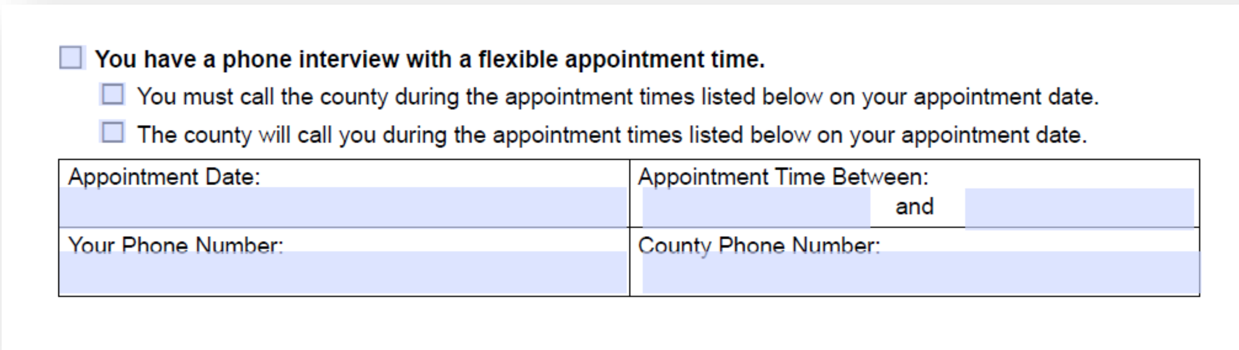
Form Mockups/Examples: See Supporting Documents #1 - #X

Updated Languages (13)**:**

English, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog, Hmong, Korean, Lao, Russian, Spanish, Vietnamese

2.9.3 Update GEN 102 Variable Population

Add variable population to the body of the GEN 102 for the new flexible Telephone Appointment section. This section will be populated when an appointment is created with a Flexible Phone Appointment type (detailed in Recommendation 2.1).



☐ **You have a phone interview with a flexible appointment time.**

☐ You must call the county during the appointment times listed below on your appointment date.

☐ The county will call you during the appointment times listed below on your appointment date.

Appointment Date:	Appointment Time Between: and
Your Phone Number:	County Phone Number:

The variables in this section will only populate if there is an appointment with a telephonic appointment category/sub-type and the 'Flexible' option has been selected from the drop-down on the Appointment Detail Page.

Existing category/sub-type combinations that will populate the 'phone interview' section are:

- Telephone Interview
- Telephone CW/CF RE Interview
- General Appointment – Telephone Interview Intake
- General Appointment – Telephone Interview Recertification
- General Appointment – 2nd Telephone Interview Recertification

Form Header Variables:

Standard population for CalSAWS Header_1

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation	Populates in Packet
Flexible Phone Interview Checkbox	Checked if GEN 102 is generated for an applicable Appointment Type	--	Y Standard Checkbox	N	Y	Y

	(see above) **and** the 'Flexible' option is checked. The drop-down on the Appointment Detail Page.					
'You Must Call' Checkbox	Checked if the 'You must call…' drop-down the Appointment Detail Page is selected **OR** the customer's phone number is '(999) 9999-999'.	--	Y Standard Checkbox	N	Y	Y
'County will call you' Checkbox	Checked if the 'County will call you…' radio button on the Appointment Detail Page is selected.	--	Y Standard Checkbox	N	Y	Y
Appointment Date	Date from Appointment Detail Page.	Arial, Size 10 mm/dd/yyyy	Y Date Field	N	Y	Y
Flexible Appointment Start Time	The Begin Time, selected from the drop-down menu in the 'Dates' section of the Appointment Detail Page.	Arial, Size 10 XX:XX	Y Time Field	N	Y	Y
Flexible Appointment End Time	The Flexible appointment window's end time.	Arial, Size 10 XX:XX	Y Time Field	N	Y	Y
Customer Phone Number	Customer's primary phone number from Appointment Detail Page. If the phone number is '(999)	Arial, Size 10 (XXX) XXX-XXXX (can include extension)	Y Phone Number	N	Y	Y

	999-9999', this field will be left blank. **Note:** This will be the same as the 'Your Phone Number' population in the above fixed phone interview section.					
County Phone Number	Populate with the Phone Number from the Appointment Detail Page (See Figure 2.1.1). This will be displayed as a new field on the Appointment Detail page (See Figure 2.1.1). If there is an extension (see Recommendation 2.1), append it to the phone number on the Form.	Arial, Size 10 (XXX) XXX-XXXX **Or** (XXX) XXX-XXXX-XXXX if there is an extension.	Y Phone Number	N	Y	Y
Comment* - No Appointment Scheduled (Migration Counties only)	Static generic message: "YOU WILL GET A SEPARATE LETTER WITH AN INTERVIEW APPOINTMENT DATE AND TIME. CALL YOUR WORKER RIGHT AWAY IF YOU DO NOT GET THE APPOINTMENT LETTER WITHIN 10 DAYS OF THIS NOTICE. YOUR APPOINTMENT LETTER WILL TELL	Arial, ALL CAPS	Y	N	Y	Y

	YOU IF YOU HAVE A PHONE INTERVIEW OR IF YOU HAVE TO COME INTO THE OFFICE FOR YOUR INTERVIEW."					
Comment – For LA County only	Populate this text whenever the form is generated for LA County via RE Auto-Scheduling Batch. "Although you have a scheduled interview appointment date and time, you can call us any time BEFORE your appointment at our Customer Service Center at (866) 613-3777 (CSC number) Monday through Friday 7:30 a.m. to 6:30 p.m. An Eligibility Worker will be available to complete your interview at your convenience."	Arial Font Size 10	Y	N	Y	Y

Variables Requiring Translation: None

***Note:** Current logic that populates the 'Comment' section with its 'No Appointment Scheduled' static message will remain unchanged. The formatting of this message will be updated to populate in ALL CAPITALS to draw reader attention.

Population for each of the three sections of the GEN 102 – fixed Phone Interview, Flexible Phone Interview, and In-Person Interview – will remain unchanged from their existing scenarios when generated alone or in a packet.

For example, an interview scheduled with a category and sub-type of 'General Appointment – Fingerprinting' will populate the In-Person section of the GEN 102. An interview with a category and sub-type of 'General Appointment – 2nd Telephone Interview Recertification' will populate either the fixed or flexible Phone Interview section, depending upon whether a flexible appointment has been indicated. For a full list of Appointment category and sub-type combinations and their population, see Supporting Documents #X.

2.10 Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets

2.10.1 Overview

Update CalFresh and CalFresh/CalWORKs combo packets to use the most recent version of the GEN 102 (1/22).

2.10.2 Replace Appointment Letter with Updated GEN 102 in CalFresh and CW/CF Packets

The updated GEN 102 will replace the outdated GEN 102 (09/2020) or existing CF 29 Series in the following packets:

Form/Packet Number	County	Currently Uses...	Current Languages	Replace with...
CW RE Packet	MIG	GEN 102 (09/2020)	All Threshold (13)	GEN 102 (1/22)
CF RE Packet	MIG	CF 29 (10/13)	All Threshold (13)	GEN 102 (1/22)
CW/CF RE Packet	MIG	GEN 102 (09/2020)	All Threshold (13)	GEN 102 (1/22)
CF Packet – LA	LAC	CF 29 (10/13) Series	EN, SP, AE, CA, CH, FA, KO, RU, TG, VI (10)	GEN 102 (1/22)

2.11 Update LA County CW/CF/MC Packet to use the new GEN 102

2.11.1 Overview

Los Angeles County's current CalFresh/CalWORKs/Medi-Cal RE Packets use the CF 29 (CalFresh Recertification Appointment Letter). Three different versions of the Packet – FS29LA 3A, FS29LA 3B, and FS29LA 3C – are generated depending upon the type of appointment scheduled.

Current Packet	Used For...
CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3A	Telephone Interview Appointment (county calls person)
CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3B	Telephone Interview Appointment (no number on file – person must provide phone number)

CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3C	Interview Appointment (in-person)

These Packets will be consolidated to a single packet and utilize the updated GEN 102 Appointment Letter. Because the GEN 102's updated population can accommodate all these scenarios, only one packet variation is needed. Existing CalWORKs/Medi-Cal Packet - FS29LA 3A/3B/3C Packets will be end-dated.

State Form: N/A

Programs: Multiple (CalWORKs, CalFresh, Medi-Cal)

Attached Forms: N/A

Forms Category: Application

Template Repository Visibility: Los Angeles County

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

*As with other CF RE Packets, the CW/CF/MC Packet for Farsi will use an English cover sheet.

2.11.2 Description of Change

1. Create a single CW/CF/MC Packet XDP for LA County.

Form
RE Appointment Letter Coversheet
GEN 102

Note: The GEN 102 CW/CF/MC Packet will follow the current process of 'pre-stuffed' RE Packets, with only the Cover Letter and GEN 102 being generated out of CalSAWS. The remainder of the forms will be pre-stuffed at the print center. Forms stuffed with this packet will remain unchanged from the existing CW/CF/MC Packet - 3A/3B/3C.

Form Header: N/A – has a coversheet (Please see section 2.12)
Form Title: CW/CF/MC Packet
Form Number: CW/CF/MC Packet
Include NA Back 9: Y
Imaging Form Name: CW/CF/MC Packet
Imaging Document Type: Customer Reporting
Form Mockups/Examples: See Supporting Documents #X

2. Update batch jobs PB19C902 and PB19C909 to point to this new packet.
3. Add the packet to Template Repository. The packet has the following required form inputs:
    - Case Number
    - Customer Name
    - Program
    - RE Month
    - Language

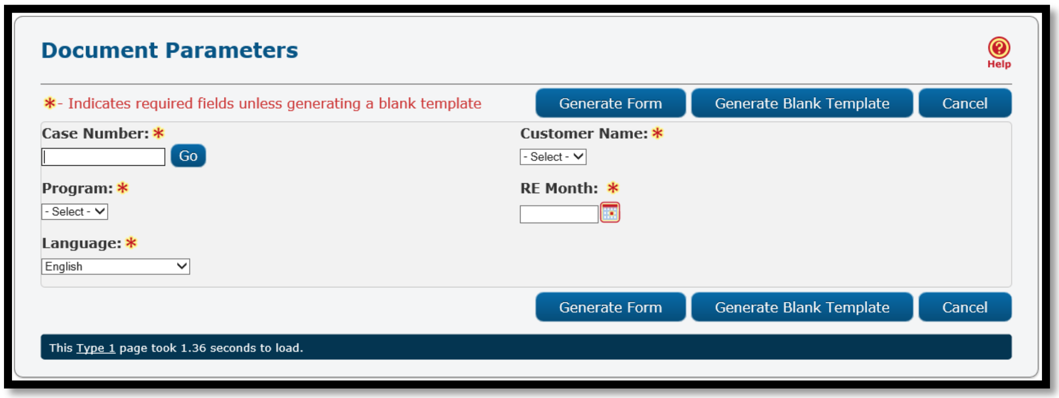


Figure 2.3.2.1 – Document Parameter Page

- Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CF/CF/MC Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'

4. Add population logic for the packet. The packet will use the existing population logic for the GEN 102 and populate the Appointment Letter based upon the type of scheduled Appointment.

   Note: *If a phone number does not exist for the participant, then "You must call the county during the appointment times listed below on your appointment date."*

5. Add the packet name for the CW/CF/MC Packet for Los Angeles County to the Redetermination Bundle Names Codes Table (CT 10448).
   Note: *The values from this codes table are used when constructing the bundle names for the packets. The packets are in mailing priority 04 for LA County.*

   Bundle Name:
   mmddyyyy_hhmmss_19_pr_4_FM_PP_CWCF_LA_lll_nnn_.pdf

6. Add the following form control for the packet:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

7. Add the following print options for the packet:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Existing Worker's Office/District Office Address used by CW/CF/MC Packet – 3A/3B/3C
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Full Size Flat Mail
Return Envelope Type	BRM
Special Paper Stock	N/A
Enclosures	Yes – Continue to use the same enclosures as the packets listed in section 2.10.1.
Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes

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

8. Add the following mailing options for the packet:

9. Create a Customer Reporting entry with the following information when the packet is generated and saved:

Field to Populate	Population for RE Packet

Type	Existing type used by CW/CF/MC Packet – 3A/3B/3C
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	Existing program used by CW/CF/MC Packet – 3A/3B/3C
Status	Customer Reporting Tracking Status
Status Date	Date of the latest Status Date

10. End-date the existing CW/CF/MC Packets:
    - CW/CF/MC Packet – 3A
    - CW/CF/MC Packet – 3B
    - CW/CF/MC Packet – 3C

2.12 Update LA County CW/MC Packet to use the new GEN 102

2.12.1 Overview

Los Angeles County's current CalWORKs/Medi-Cal RE Packets use the CF 29 (CalFresh Recertification Appointment Letter). Three different versions of the Packet – FS29LA 3A, FS29LA 3B, and FS29LA 3C – are generated depending upon the type of appointment scheduled.

Current Packet	Used For…
CalWORKs/Medi-Cal Packet - FS29LA 3A	Telephone Interview Appointment (county calls person)
CalWORKs/Medi-Cal Packet - FS29LA 3B	Telephone Interview Appointment (no number on file – person must provide phone number)
CalWORKs/Medi-Cal Packet - FS29LA 3C	Interview Appointment (in-person)

These Packets will be consolidated to a single packet and utilize the updated GEN 102 Appointment Letter. Because the GEN 102's updated population logic can accommodate all these scenarios, only one packet variation is needed. Existing CalWORKs/Medi-Cal Packet - FS29LA 3A/3B/3C Packets will be end-dated.

State Form: N/A

Programs: Multiple (CalWORKs, Medi-Cal)

Attached Forms: N/A

Forms Category: Application

Template Repository Visibility: Los Angeles County

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

*As with other CF RE Packets, the CW/MC Packet for Farsi will use an English cover sheet.

2.12.2 Description of Change

1. Create a single CW/MC Packet XDP for LA County. This packet will have three impressions – two for the GEN 102, and a third for the Redetermination Mail Back Cover Letter.

Form
RE Appointment Letter Coversheet
GEN 102

Note: The GEN 102 CW/MC Packet will follow the current process of 'pre-stuffed' RE Packets, with only the Cover Letter and GEN 102 being generated out of CalSAWS. The remainder of the forms will be pre-stuffed at the print center. Forms stuffed with this packet will remain unchanged from the existing CW/MC Packet - 3A/3B/3C.

Form Header: N/A – has a coversheet (Please see section 2.12)
Form Title: CW/MC Packet
Form Number: CW/MC Packet
Include NA Back 9: Y
Imaging Form Name: CW/MC Packet
Imaging Document Type: Customer Reporting
Form Mockups/Examples: See Supporting Documents #X

2. Update batch jobs PB19C902 and PB19C909 to point to this new packet.
3. Add the packet to Template Repository. The packet has the following required form inputs:
    - Case Number
    - Customer Name
    - Program
    - RE Month
    - Language

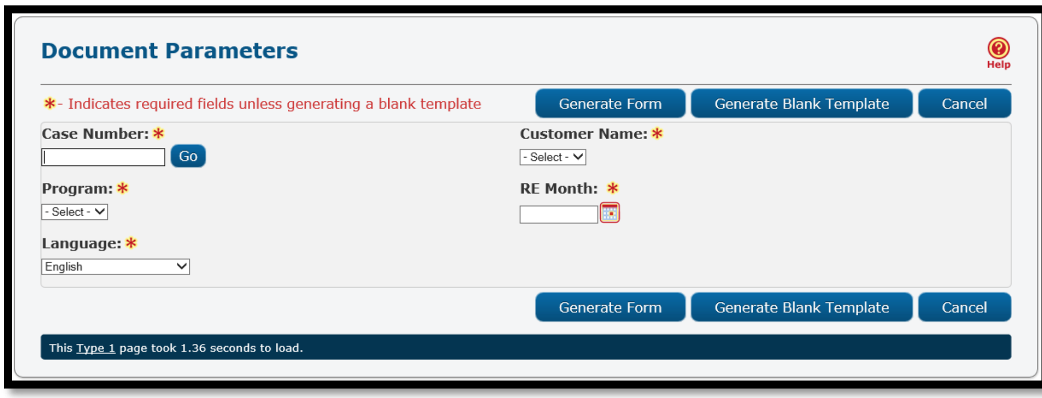


Figure 2.3.2.1 – Document Parameter Page

- Add validation on the Document Parameters page to prevent the generation of the packet from Template Repository when a CF/CF/MC Packet in any status except 'Not Applicable' for the same RE Month exists. The validation message will state: 'RE Month - RE packet has been sent for this RE Due Month. Reprint if another one is needed.'

4. Add population logic for the packet. The packet will use the existing population logic for the GEN 102 and populate the Appointment Letter based upon the type of scheduled Appointment.

   Note: *If a phone number does not exist for the participant, then "You must call the county during the appointment times listed below on your appointment date."*

5. Add the packet name for the CW/MC Packet for Los Angeles County to the Redetermination Bundle Names Codes Table (CT 10448).

   Note: *The values from this codes table are used when constructing the bundle names for the packets. The packets are in mailing priority 04 for LA County.*

   Bundle Name:
   mmddyyyy_hhmmss_19_pr_4_FM_PP_CW_LA_lll_nnn_.pdf

6. Add the following form control for the packet:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

7. Add the following print options for the packet:

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

8. Add the following mailing options for the packet:

Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Existing Worker's Office/District Office Address used by CW/MC Packet – 3A/3B/3C
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Full Size Flat Mail
Return Envelope Type	BRM
Special Paper Stock	N/A
Enclosures	Yes – Continue to use the same enclosures as the packets listed in section 2.11.1.
Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes
Mailing Options	Option for RE Packet
Mail-To (Recipient)	When generated through the batch process, the CalFresh Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Existing Worker's Office/District Office Address used by CW/MC Packet – 3A/3B/3C
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Full Size Flat Mail
Return Envelope Type	BRM
Special Paper Stock	N/A
Enclosures	Yes – Continue to use the same enclosures as the packets listed in section 2.11.1.

Electronic Signature	Yes
Check to Sign	No
Post to SSP	Yes

9. Create a Customer Reporting entry with the following information when the packet is generated and saved:

Field to Populate	Population for RE Packet
Type	Existing Type used by CW/MC Packet – 3A/3B/3C
Submit Month - when generated from Template Repository	RE Month from Document Parameters page
Submit Month - when generated through Batch	Current CalFresh Program RE Due Date
Program	Existing Program used by CW/MC Packet – 3A/3B/3C
Status	Customer Reporting Tracking Status
Status Date	Date of the latest Status Date

11. End-date the existing CW/CF/MC Packets:
    - CW/MC Packet – 3A
    - CW/MC Packet – 3B
    - CW/MC Packet – 3C

2.13 Add new LA County RE Appointment Letter Coversheet

2.13.1 Overview

Currently the packets end-dated in sections 2.10 and 2.11 use 3 different coversheets. The CW/CF/MC Packet - FS29LA 3A and CW/MC Packet - FS29LA 3A uses the same coversheet. The CW/CF/MC Packet - FS29LA 3B and CW/MC Packet - FS29LA 3B uses the same coversheet. The CW/CF/MC Packet - FS29LA 3C and CW/MC Packet - FS29LA 3C uses the same coversheet. This new coversheet is adapted from the 3A series coversheet to be used by the two new packets in sections 2.10 and 2.11.

State Form: N/A – LA County Specific form

Programs: CalWORKs, CalFresh, and Medi-Cal

Attached Forms: CW_CF_COVERSHEET_FRAG_EN (Coversheet with Business Reply Mail)

Forms Category: Forms

Template Repository Visibility: LA County

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

2.13.2 Form Verbiage

Create Form XDP

The existing XDPs for CW/CF/MC Packet - FS29LA 3A and CW/MC Packet - FS29LA 3A will be leveraged for this new coversheet.

Form Header: Same as existing coversheet (See FS29LA3-A_EN_FRAG.xdp)

Form Title (Document List Page Displayed Name): This new coversheet is not displayed in the Document List Page as a stand-alone.

Form Number: RE Appointment Letter Coversheet

Include NA Back 9: No

Imaging Form Name: N/A

Imaging Document Type: N/A

Imaging Case/Person: N/A

Form Mockups/Examples: Please see supporting document #4

2.13.3 Form Variable Population

The variable population logic for this new coversheet will be as follows:

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository Population	Populates with Form Generation
CERT_END_DATE	Populates the end date of the certification period. Follows the same population logic as the current coversheet for the	Arial Font Size 10	Y / Date field	Yes	Yes

	FS29LA packets.				

2.13.4 Form Generation Conditions

There are no form generation conditions for this coversheet. This coversheet is attached to the front of the new CW/CF/MC Packet (see section 2.10) and CW/MC Packet (see section 2.11).

2.14 Update LA County Appointment Batch

2.14.1 Overview

The Recertification Appointment Batch (PB19C902 and PB19C909) is a two-day batch that schedules RE appointments for CW/CF cases with an RE Due Date in the upcoming month. This section outlines the necessary modifications to the batch job when scheduling appointments for the upcoming RE Due Month.

The RE Appointment Batch logic will distribute appointments throughout the RE appointment period for workers who do not have a daily threshold. Batch will first schedule appointments on the first available time slot(s) for each day from the beginning of the RE appointment period until the end of the appointment period and will increment throughout the days until all cases assigned to the worker have been scheduled.

2.14.2 Description of Change

1. If a phone number is available for the participant
   a. Modify the auto scheduling logic for (PB19C902 and PB19C909) to create an over lapping telephone appointment with
      i. Category: "General Appointment"
      ii. Sub type: "Telephone Interview Recertification"
      iii. Initiate Call (new field): "Worker"
      iv. Phone Number (new field): Primary workers phone number.
      v. Update the "Flexible Block Appointment" to be checked.
      vi. Update the appointment stop time to be 15 minutes from the start time.
      vii. Update the "Flexible End time" to be 2 hours from the start time.

   all other existing logic will remain the same. (See Assumption 14)
2. Appointments should last 2 hours and should be booked in overlapping 15 min increments.
3. Book appointments only if the entire two-hour block is available.

4. Only "Flexible Block Appointments" can overlap other "Flexible Block Appointments".
5. See supporting document #3 for additional criteria on overlapping logic.
6. If a phone number is not available for the participant or the participant phone number is "(999) 999-9999" create an overlapping appointment with
    i. Category: "General Appointment"
    ii. Sub type: "Telephone Interview Recertification"
    iii. Initiate Call (new field): "Customer"
    iv. Phone Number (new field): Primary workers phone number.
    v. Update the "Flexible Block Appointment" to be checked.
    vi. Update the appointment stop time to be 15 minutes from the start time.
    vii. Update the "Flexible End time" to be 2 hours from the start time.
    ~~viii. If a phone number does not exist for the participant, then "You must call the county during the appointment times listed below on your appointment date."~~

2.14.3 Execution Frequency

No Change. This batch job runs monthly on the 4th and 5th business day.

2.14.4 Key Scheduling Dependencies

No Change.

2.14.5 Counties Impacted

Los Angeles County

2.14.6 Data Volume/Performance

Currently approximately 20,000 – 50,000 appointments for CalWORKs/CalFresh cases are created monthly.

2.14.7 Failure Procedure/Operational Instructions

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

Note: For additional information on GEN 102 population when generated from an LA County Auto-scheduling job, see Appendix.

~~2.15 Update Worker/Intake Schedule Population Batch Job~~

~~2.15.1 Overview~~

~~The PB00M203 batch job creates future months in the intake schedule tables so that workers can schedule appointments. This job links Intake schedule appointments and marks them as Single or Multiple.~~

~~2.15.2 Description of Change~~

~~Update the PB00M203 job so that all appointments with the "Flexible Block Appointment" indicator are considered as "Single" appointments.~~

~~2.15.3 Execution Frequency~~

~~No Change.~~

~~2.15.4 Key Scheduling Dependencies~~

~~No Change.~~

~~2.15.5 Counties Impacted~~

~~Los Angeles County~~

~~2.15.6 Data Volume/Performance~~

~~N/A~~

~~2.15.7 Failure Procedure/Operational Instructions~~

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

2.16 Update NOMI Letter Generation Conditions for Packet Appointment Types

2.16.1 Overview

The CF 386, CalFresh Notice of Missed Interview (NOMI) is currently generated via daily Batch (Batch #: PB00R541) for the following Appointment Category/Sub-type combinations:

	Appointment Category	Sub-Type (if applicable)
Intake	Intake Interview	-
Intake	General Appointment	Telephone Interview Intake
Recertification	Re-Evaluation CW/CF Interview	-
Recertification	Telephone CW/CF Interview	-
Recertification	General Appointment	Telephone Interview Recertification
Recertification	~~General Appointment~~	~~Re-Affirmation Non-group~~

Note: For a full description of the NOMI's existing generation conditions, see Appendix.

This change will update the NOMI Letter's generation conditions to remove the 'General Appointment – Re-Affirmation Non-group' appointment type, and add 'RE Interview' appointment types to its generation conditions.

State Form: CF 386 (2/14) – CalFresh Notice Of Missed Interview
Current Programs: CalFresh
Current Attached Forms: NA Back 9
Current Forms Category: Form
Current Template Repository Visibility: All Counties
Existing Languages (13): English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Lao, Korean, Russian, Tagalog, Vietnamese

2.16.2 Update CF 386 NOMI Letter Generation Conditions

Update the CF 386 NOMI Letter to generate for the following interview Category and Sub-Type combinations:

	Appointment Category	Sub-Type (if applicable)
Int	Intake Interview	-

	General Appointment	Telephone Interview Intake
Recertification	Re-Evaluation CW/CF Interview	-
	Telephone CW/CF Interview	-
	General Appointment	Telephone Interview Recertification
	RE Interview	-

2.17 Automated Regression Test

2.17.1 Overview

Create new automated regression test scripts to verify the new functionality of the Customer Appointment Detail, Worker Schedule Search, Customer Appointment Search, Appointment List, and Daily Schedule pages.

2.17.2 Description of Change

1. Create new regression scripts to verify each of the following scenarios in "Create", "Edit", or "Reschedule" mode of the Customer Appointment Detail page:
    a. The 'Flexible Block Appointment' checkbox displays when each of the following Category and Appointment-Type combinations is selected:
        i. Category: Telephone Interview
        ii. Category: Telephone CW/CF RE Interview
        iii. Category: General Appointment, and:
            1. Appointment-Type: 2nd Telephone Interview Recertification
            2. Appointment-Type: Telephone Interview Intake
            3. Appointment-Type: Telephone Interview Recertification
    b. When the 'Flexible Block Appointment' checkbox is selected the following fields display and are editable: 'Initiate Call', 'Phone Number', 'Extension'.
        i. If at least one Worker is associated to the appointment, the fields are pre-populated with the details of the first Worker (if available).
        ii. If no Worker is associated to the appointment, the fields are pre-populated with blank values.
    c. When the 'Flexible Block Appointment' checkbox is selected the "Suggest Time" button is not displayed.
    d. A validation message displays when attempting to save the page with a Phone Number value that:
        i. Does not match the required form
        ii. Starts with a zero
    e. A validation message displays when attempting to save the page with an Extension value that does not match the required form.
    f. A validation message displays when attempting to save the page with the 'Flexible Block Appointment' checkbox is selected and no value is populated for each of the following fields:
        i. Initiate Call

ii. Phone Number

Technical Note: Each scenario will be verified in at least one of the listed page modes, but will not be repeated for every such page mode.

2. Create new regression scripts to verify each of the following in “View” mode of the Customer Appointment Detail page when the ‘Flexible Block Appointment’ checkbox is selected:
    a. The following fields display: ‘Initiate Call’, ‘Phone Number’, ‘Extension’.
    b. The ‘End Time’ column and value display in the “Dates” section.
3. Create new regression scripts to verify the following on the Customer Schedule Search page:
    a. ‘Flexible’ field is available in the ‘Refine Your Search’ section
    b. Search results match the value selected from the ‘Flexible’ field

    Technical Note: This includes both positive and negative verifications (positive: match displays; negative: non-match does not display).
4. Create new regression scripts to verify the following on the Customer Appointment Search page:
    a. ‘Flexible’ field is available in the search criteria section
    b. ‘Flexible’ field is required
    c. Search results match the value selected from the ‘Flexible’ field

    Technical Note: This includes both positive and negative verifications.
5. Create new regression scripts to verify the search result column display on the following pages:
    a. Worker Schedule Search
    b. Customer Schedule Search
    c. Customer Appointment Search
    d. Appointment List
    e. Daily Schedule

2.18 Appointments API

2.18.1 Overview

The Appointments API provides ancillary applications a way to access appointment data from CalSAWS. This API also allows applications to create new appointments or update existing ones.

2.18.2 Description of Changes

1. Create and apply the changes to a new version of the appointments API.
2. GET endpoints
    a. For all GET endpoints update the response object to include data for
        i. Flexible block appointment check box value
        ii. Initiate call
        iii. Phone number
        iv. Appointment Duration
        v. Flexible end time
3. POST endpoint
    a. Add the following data elements to the request body
        i. Flexible block appointment check box value
        ii. Initiate call
        iii. Phone number
        iv. Appointment Duration
        v. Flexible end time
    b. Flexible block appointment can be used only when
        i. the "Category" field is 'Telephone Interview' or 'Telephone CW/CF RE Interview' OR
        ii. the Category field is 'General Appointment' and the Appointment-Type field is '2nd Telephone Interview Recertification', 'Telephone Interview Intake', or 'Telephone Interview Recertification'.
    c. If a value is being sent for Flexible block appointment and
        i. the value is 'Y' or "True"
            1. Make the other fields listed above required.
        ii. If the value is 'N' or "False"
            1. The other fields listed above are not required
    d. Update the endpoint response to include the values above if available.
    e. See supporting document for additional details.
4. PUT endpoint
    a. Update the response object to include the values if available.
        i. Flexible block appointment check box value
        ii. Initiate call date
        iii. Phone number

iv. Appointment Duration data
v. Flexible end time data

b. See supporting document for additional details.

5. Appointment Duration is calculated by taking the stop time of the appointment and subtracting the start time.

2.19 Update BC Form Sender Writer batch job to insert records for CW/CF/MC and CW/MC Packets

2.19.1 Overview

The BC Form Sender Writer batch (PO00C491) inserts records in database to identify the cases that the Form Status batch job will need to process.

2.19.2 Description of Change

1. Modify the batch job to replace the logic in inserting the RE request records for the following packets to use CW/CF/MC Packet:
   - CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3A
   - CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3B
   - CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3C
2. Modify the batch job to replace the logic in RE request records for the following packets to use CW/MC Packet:
   - CalWORKs/Medi-Cal Packet - FS29LA 3A
   - CalWORKs/Medi-Cal Packet - FS29LA 3B
   - CalWORKs/Medi-Cal Packet - FS29LA 3C

2.19.3 Execution Frequency

No Change. Daily (Mon-Fri).

2.19.4 Key Scheduling Dependencies

No Change.

2.19.5 Counties Impacted

CalSAWS Counties.

2.19.6 Data Volume/Performance

N/A

2.19.7 Interface Partner

BenefitsCal Portal

2.19.8 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.)

2.20 Update Form Status batch job to send new CW/CF, CW/CF/MC, and CW/MC Packets

2.20.1 Overview

The Form Status batch (PB00C3XX) sends the RE information to the Self-Service Portal so that the portal can display the customer's RE information on the RE submission pages.

2.20.2 Description of Change

1. Modify the batch job to replace the logic in sending the RE information for the following packets to use CW/CF/MC Packet:
   - CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3A
   - CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3B
   - CalWORKs/CalFresh/Medi-Cal Packet - FS29LA 3C
2. Modify the batch job to replace the logic in sending the RE information for the following packets to use CW/MC Packet:
   - CalWORKs/Medi-Cal Packet - FS29LA 3A
   - CalWORKs/Medi-Cal Packet - FS29LA 3B
   - CalWORKs/Medi-Cal Packet - FS29LA 3C

2.20.3 Execution Frequency

No Change. Daily (Mon-Fri).

2.20.4 Key Scheduling Dependencies

No Change.

2.20.5 Counties Impacted

CalSAWS Counties.

2.20.6 Data Volume/Performance

N/A

2.20.7 Interface Partner

BenefitsCal Portal

2.20.8 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.)

3 SUPPORTING DOCUMENTS

Ref #	Document	Functional Area	Description	Attachment
1	GEN 102 Mockup (EN)	Client Correspondence	Mockup of the GEN 102 (1/21) in English with the following scenarios: • Flexible Phone Appointment • In-Person Appointment	GEN 102 11/22 Mockup - Flexible Phc GEN 102 11/22 Mockup - In-Person
~~2~~	~~GEN 102 Mockup – Threshold Languages~~	~~Client Correspondence~~	~~Mockup of the GEN 102 (1/21) in the following languages:~~ • ~~Armenian~~ • ~~Arabic~~ • ~~Cambodian~~ • ~~Chinese~~ • ~~Farsi~~ • ~~Tagalog~~ • ~~Hmong~~ • ~~Korean~~ • ~~Lao~~ • ~~Russian~~ • ~~Spanish~~ • ~~Vietnamese~~	~~<Pending Approval>~~

3	LAC Appointment Schedule Graphical Aid	Batch	Spreadsheet detailing scheduling pattern for LA County's auto-scheduling Batch Job (see Recommendation 2.6)	LAC Appointment Schedule Graphical Ai
4	Coversheet	Client Correspondence	RE Appointment Letter Coversheet	RE_APPT_Coversheet.pdf
5	Appointments.html	API	API documentation	Appointments.html

4 APPENDIX

4.1 GEN 102 Population when Auto-scheduled

Per LA County's CDI, the county's auto-scheduling batch job will send and populate GEN 102 Packets with the following population:

a. Always <check> "You have a flexible interview appointment" and "The county will call you during the business hours listed below."
b. Appointment Date = the appointment date scheduled
c. Appointment Time Between = The actual appointment time + 2 hours

   EX: Appointment time is 8:15am. then the field will be populated with 8:15am and 10:15am. If the Appointment Time is 8:30am, then the field will be populated 8:30am and 10:30am

d. Your Phone Number = current functionality (logic to pull the phone number on CF 29-LA 3 form)
e. County Phone Number = current functionality
f. If a phone number does not exist for the participant, then "You must call the county during the appointment times listed below on your appointment date."
   i. Appointment Date = current functionality per FS 29 LA 3B
   ii. Appointment Time = current functionality per FS 29 LA 3B
   iii. County Office Name = current functionality per FS 29 LA 3B
   iv. County Office Address: current functionality
   v. City = current functionality
   vi. State = current functionality
   vii. Zip Code = current functionality

5 REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. **Appointment notices;** b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters;	This SCR updates the GEN 102 Appointment Letter to generate the state's most recently published version of the Form.

	f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253708

Consolidate the Worklist Pages into the Task Pop-Up Pages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/04/2023	1.0	Initial Revision	Vallari Bathala, Justin Dobbs
07/26/2023	1.1	Updated section 2.2.3 Description of Changes to include Status column as one of the columns which will not appear in Approvals mode: 3. Approvals – This mode will not display the Category, Worker ID, Bank ID, Status and Date Appended columns and will display the following columns Updated section 2.2.2 Task Search Mockups, Figure 2.2.2-1 – Task Search – Standard, Figure 2.2.2-2 – Task Search – PR/RE and Figure 2.2.2-3 – Task Search – Approvals to include the General dropdown as part of the mockup. This drop down is existing functionality.	Vallari Bathala
08/21/2023	1.2	Updated Section 2.2.3 Description of changes to correct the formatting of the Submit Month column form MM/DD/YYYY to MM/YYYY: 1.d.iv.2.a Submit Month – The Submit Month for the Customer Report that is associated to the Task as seen on the Customer Reporting Detail page. This value will be formatted as MM/YYYY.	Vallari Bathala

Table of Contents

1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Task Pop-Up: My Tasks Page

2.1.1 Overview

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

2.1.2 y Tasks Mockup

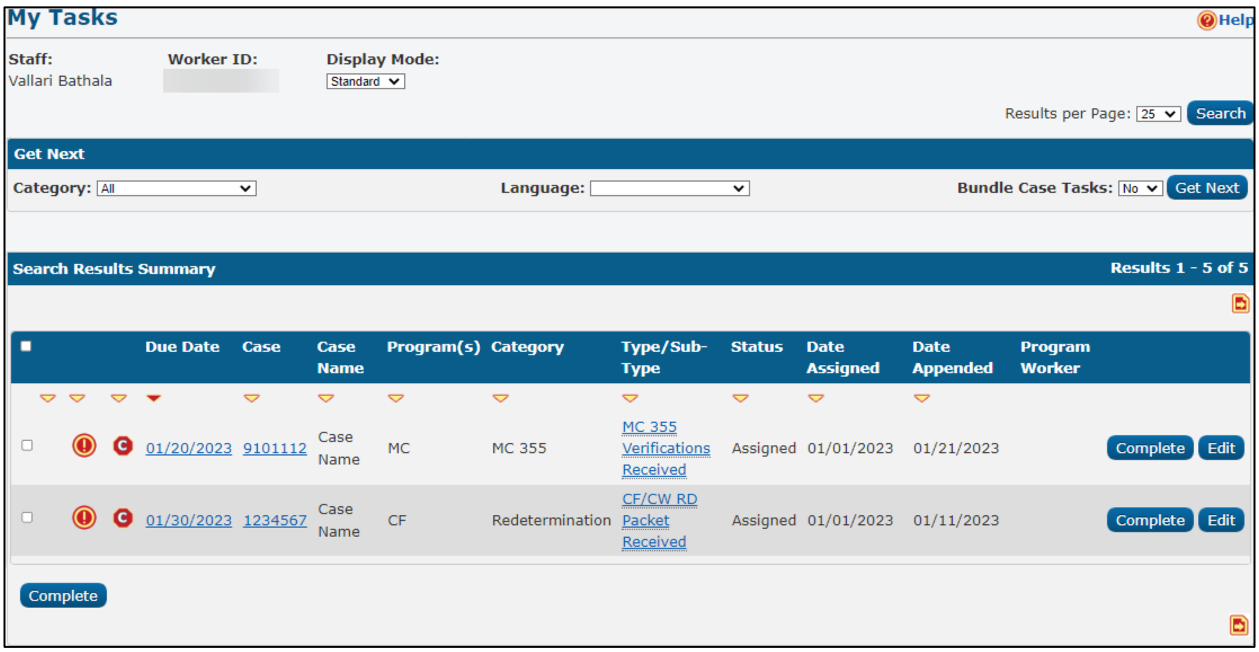


Figure 2.1.2-1 – My Tasks – Standard Display Mode

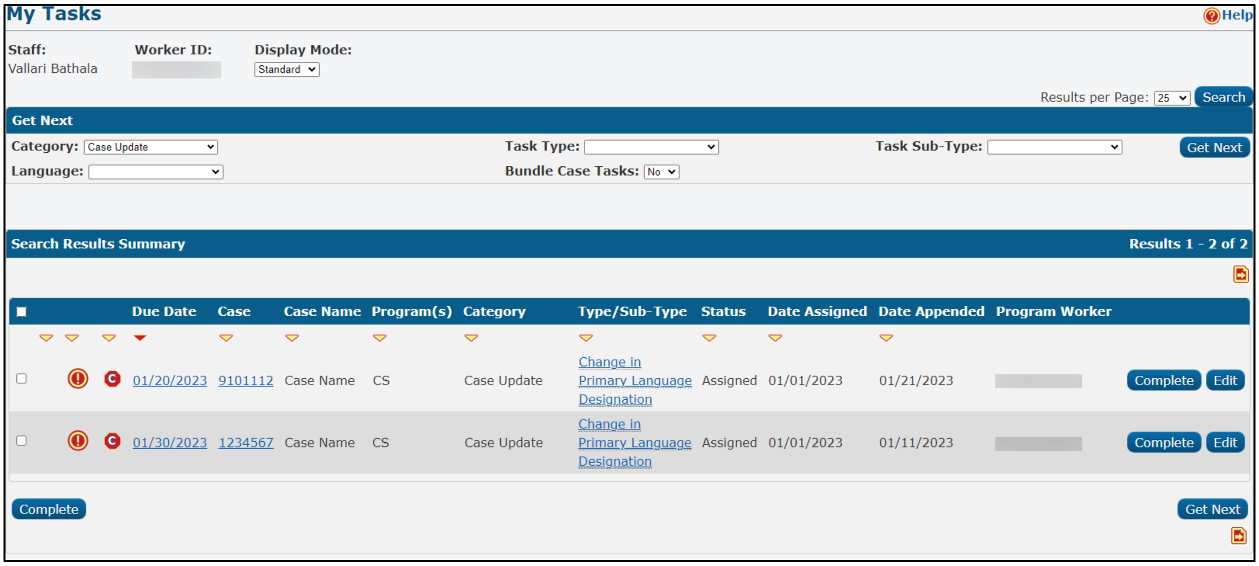


Figure 2.1.2-2 – My Tasks – Standard Display Mode with Type / Sub-Type

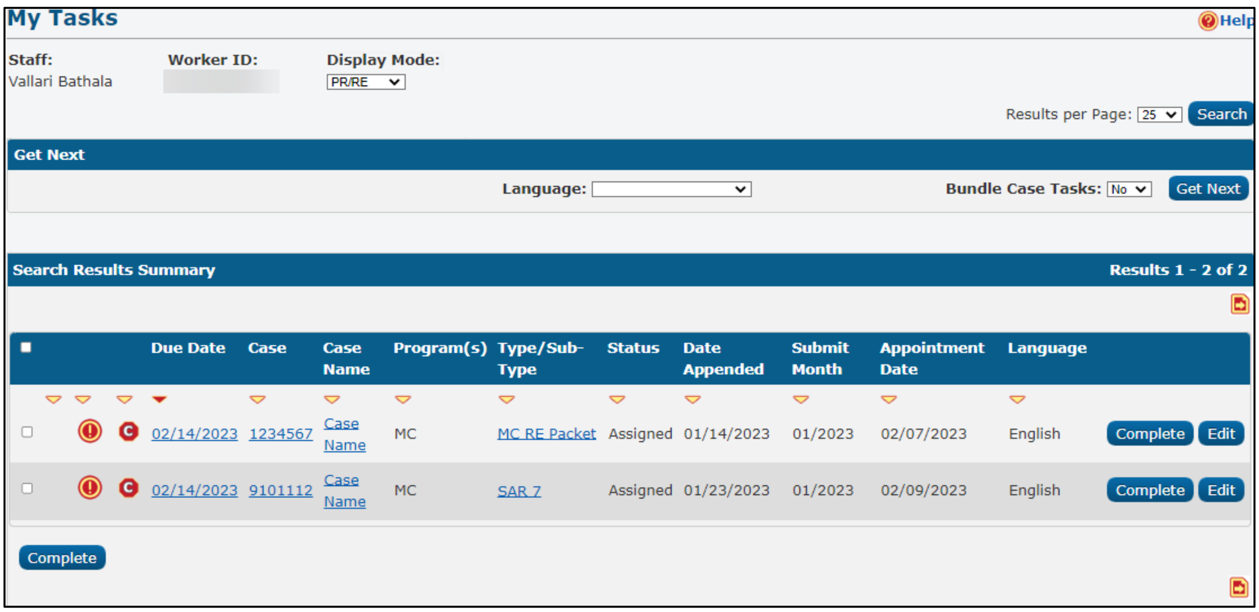


Figure 2.1.2-3 – My Tasks – PR/RE Display Mode

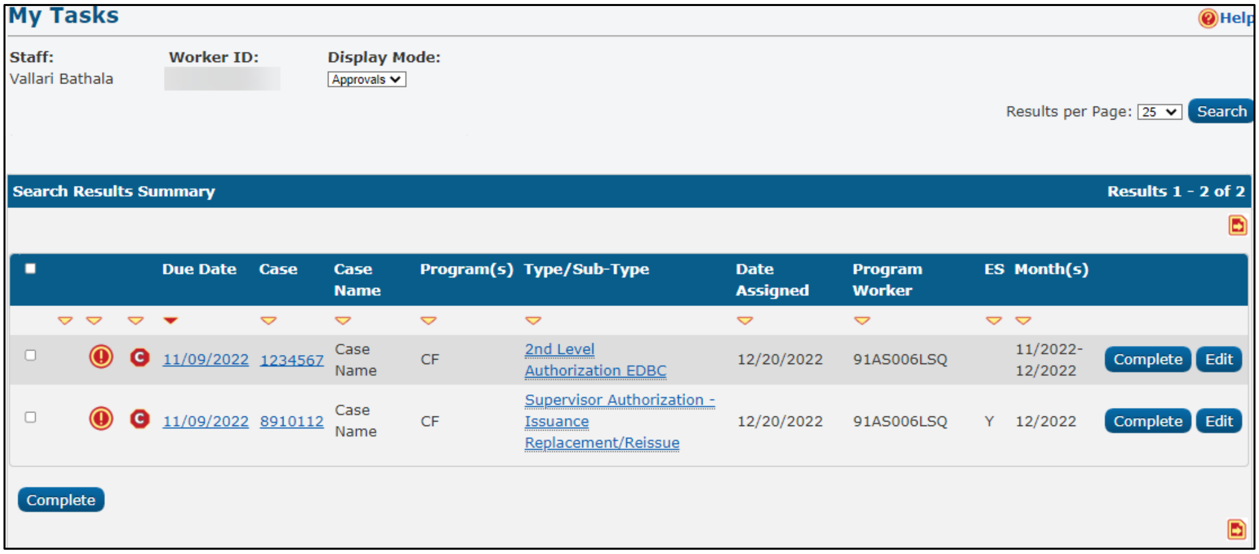


Figure 2.1.2-4 – My Tasks – Approvals Display Mode

2.1.3 Description of Changes

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

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

        ii. PR/RE

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

        iii. Approvals

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

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

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

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

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

b. Get Next

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

The following search attributes will display in this panel:

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

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

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

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

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

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

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

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

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

a. ES – This column will display 'Y' if the below criteria are met, otherwise the column will display 'N':
    i. The Task Type Category is "EDBC"
    ii. The Authorization Task is associated to an EDBC that indicates Expedited Service OR the CalFresh program indicates Entitled to Expedited Service on the CalFresh Program Detail page where the File Date is within the authorization period.

b. Month(s) – This column will display the month(s) of EDBC that are pending authorization where:
    i. The Authorization Task Category is "EDBC"
    ii. The EDBC Run Status is "Pending Authorization"

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

d. **BUTTON**: Complete – When clicked, Tasks that have been selected via the Selectable checkbox will be Completed.

e. Remove the Get Next **BUTTON** located at the bottom right side of the page below the Search Results Summary panel.

2.1.4 Page Validations

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

"Complete – Please select a Task to complete."

2.1.5 Page Location

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

2.1.6 Security Updates

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

2.1.7 Page Mapping

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

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Search Page

2.2.1 Overview

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

2.2.2 Task Search Mockup

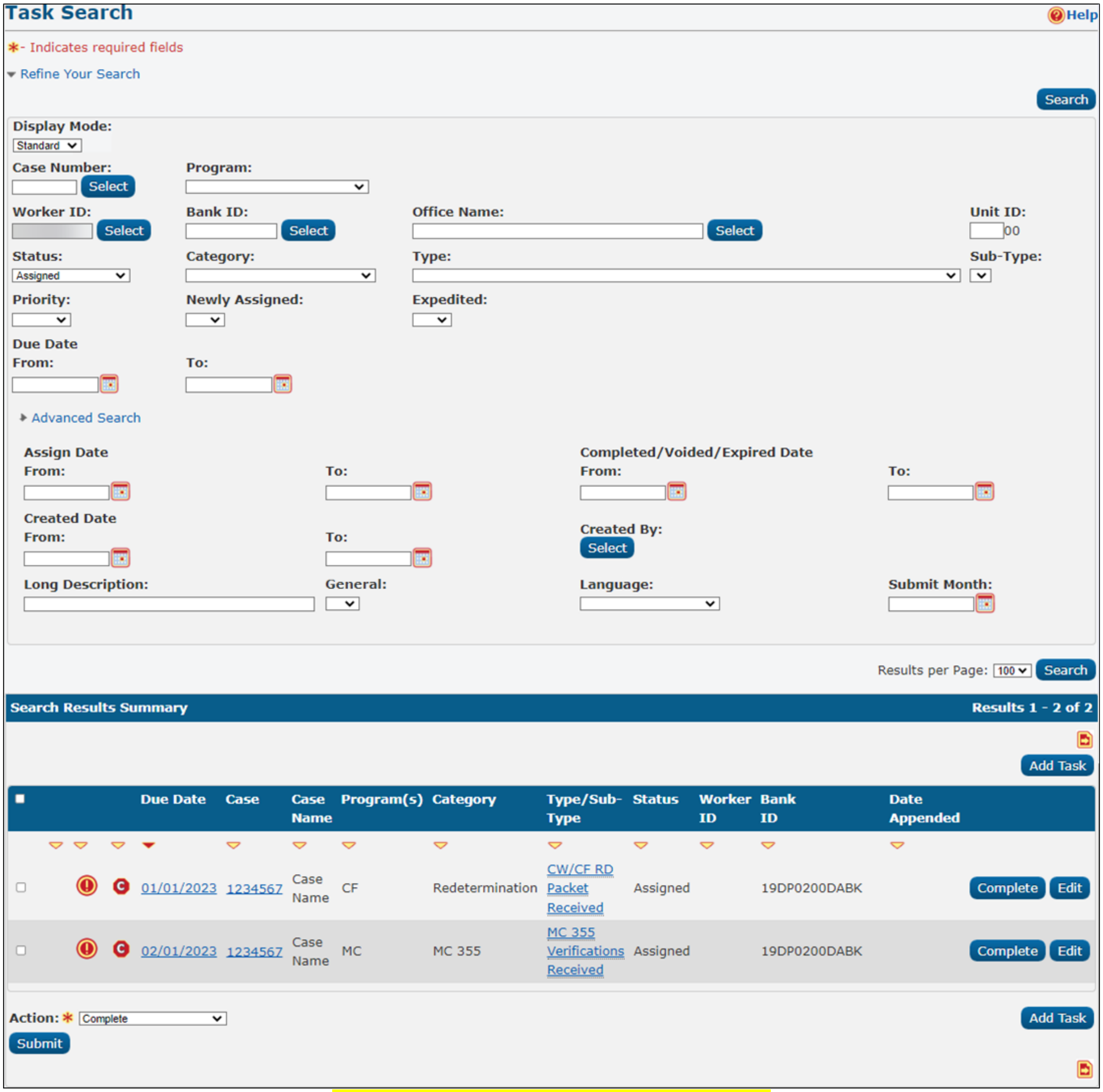


Figure 2.2.2-1 – Task Search – Standard

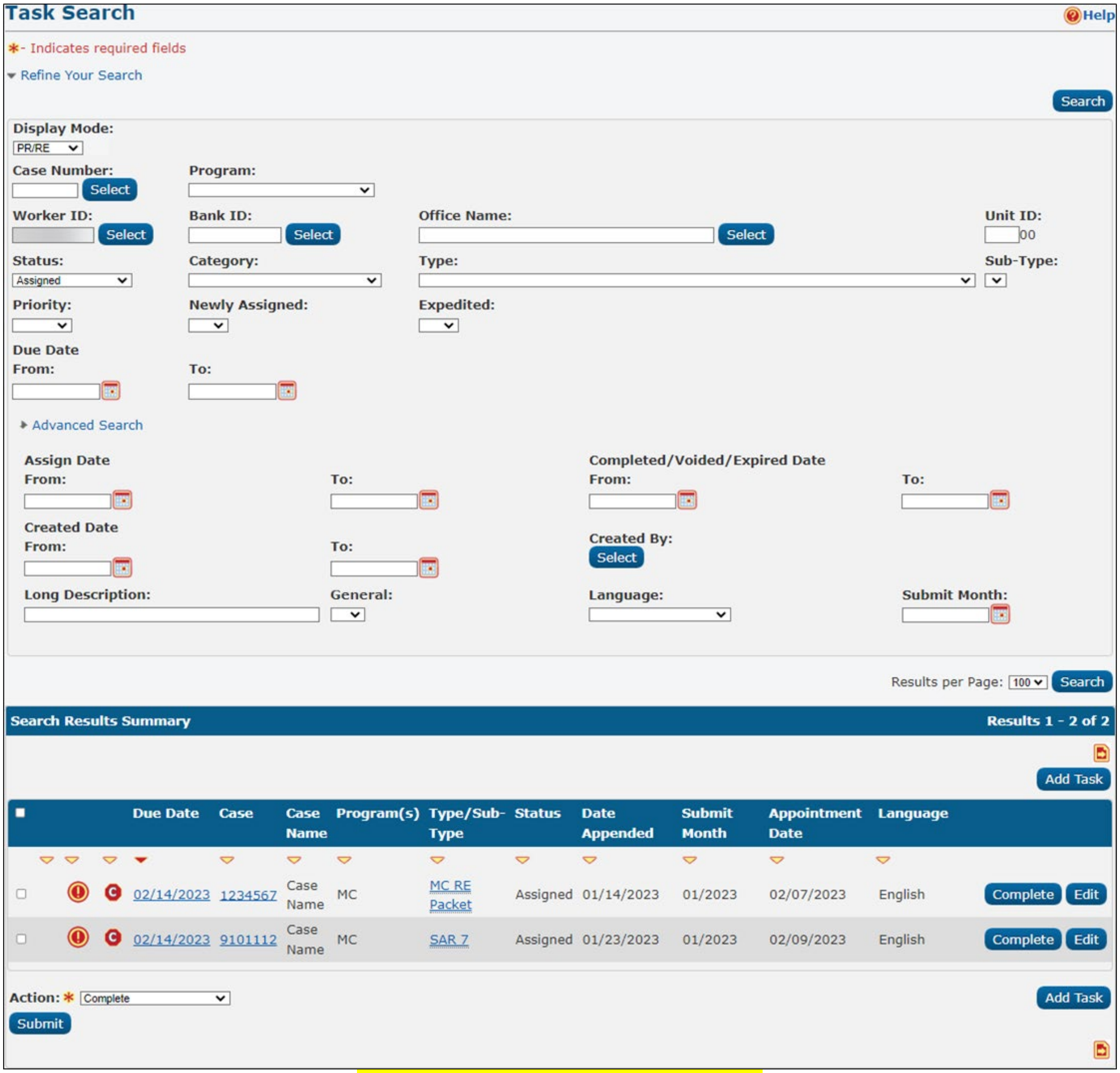


Figure 2.2.2-2 – Task Search – PR/RE

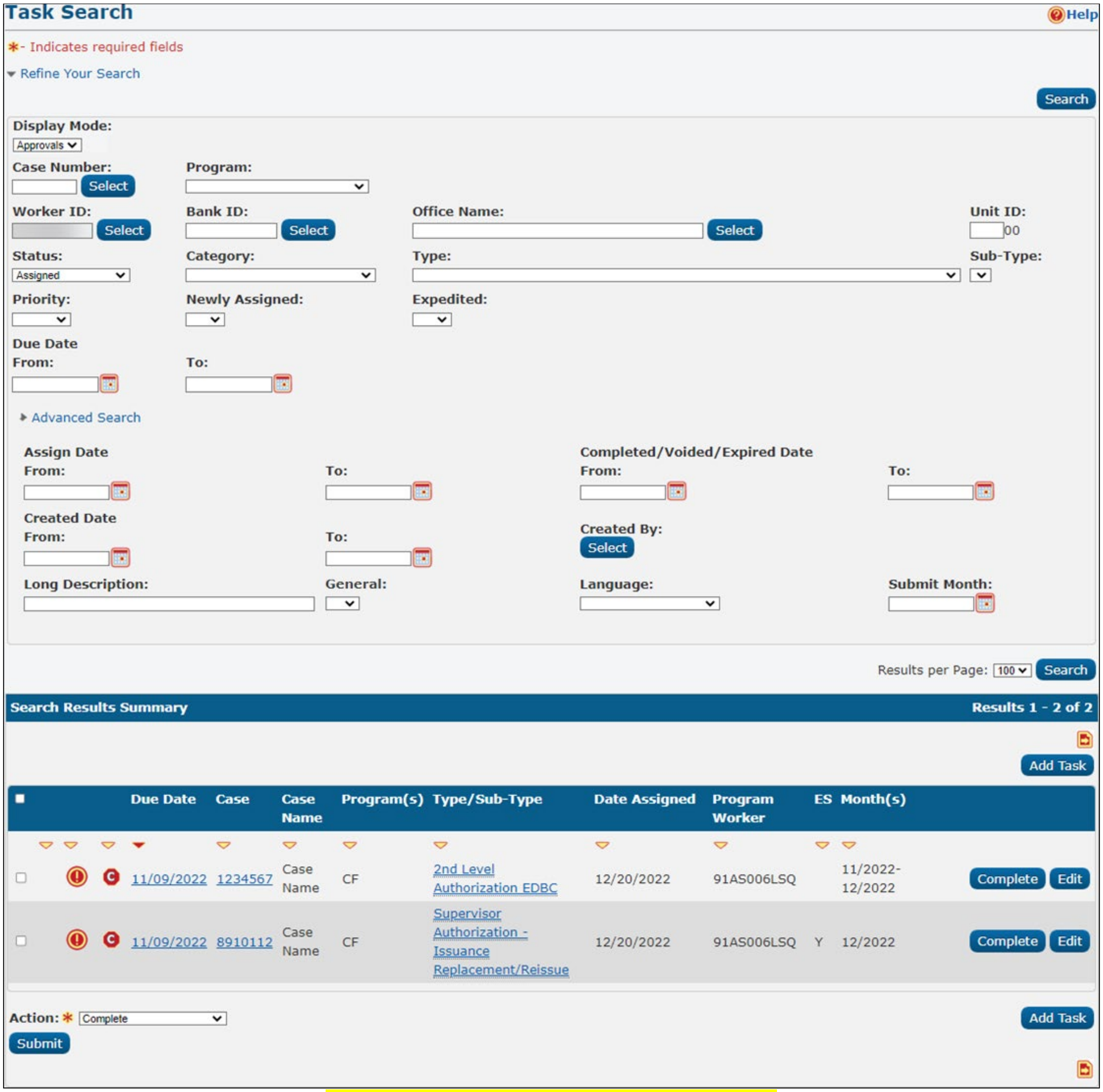


Figure 2.2.2-3 – Task Search – Approvals

2.2.3 Description of Changes

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

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

      ii. PR/RE

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

iii. Approvals

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

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

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

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

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

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

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

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

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

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

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

2.2.4 Page Validations

N/A

2.2.5 Page Location

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

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

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

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Export: Templates

2.3.1 Overview

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

2.3.2 Export Template Mockup

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

Figure 2.3.2.1 – Export Template

2.3.3 Description of Changes

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

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

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

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

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

2.4 Get Next Processing

2.4.1 Overview

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

2.4.2 Description of Changes

Update Get Next processing as follows:

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

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

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

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

N/A

5 APPENDIX

N/A

California Statewide Automated Welfare System

Design Document

CA-263212

Expand the Child Care Admin portal to display referral information for external provider/agencies

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/01/2022	1.0	Initial	Kusnadi.E
07/02/2023	1.1	Updates based on further input from Build team. 1. Added to Section 1.4 Assumption #8 that the external provider/agency can accept HTML formatted email messages. 2. Updates to Section 2.1 a. Updates was made to Section 2.1.3 that the Send E-mail button matches with the mockup. 3. Updates to Section 2.3 a. #1c to remove the reference asking the user to select a button. Update the title of the buttons instead in order to make sure it makes sense in the scenario where only 1 button is being displayed on the page. Updated the note in reference of not seeing any buttons at all. Since user that	Kusnadi.E

		are not assign to any security role, will not see the welcome page once they log in. b. Added to #2b that clicking the CalSAWS logo will bring the user back to the Welcome Page. #2d.ii is updated to include a clarification on what an "error" is. #2d.iii.1.f is updated from Referral Type to Need Type so that it aligns with the Summary Type and CalSAWS since there is no Referral Type. c. Added a note to #3b about clicking the CalSAWS logo. Added to #3c what the Dashboard page will look like when user click on the left arrow icon from the summary page. Added a Note to #3ei2e on where the Primary language of the person will be based on in CalSAWS application. 4. The following updates were made throughout Section 2.3.3:	

		a. Added the format of what telephone number information will display as. b. Added the format of what address information will display as. c. Updated e-Mail Address to E-mail address. d. Added to the Case Manager Section for the Phone number to also include Extension information if available. e. Added #4 to update the Window title from Child Care Administrator Portal to CalSAWS Administrator Portal 5. Updated Section 2.5.10 to N/A 6. Added to Project Requirement to Section 4.1 7. Added to Section 2.1.3 to the e-mail body to include "Code Code: 33" to make it clear that 33 is the county code that the external agency/provider will need to input on the Portal search parameter. Also, added additional verbiage that the e-mail address used	

		to send the e-mail is not monitored, so they should not be replying to the e-mail.	
7/28/2023	2.0	Content Revision: Updates made to Section 2.3 • Added a new mockup to Section 2.3.2 (Figure 2.3.13) to display what the page will look like when there's multiple phone numbers, extension and if the phone number is not 10 digits. • Updated Section 2.3.3 to add how the page will display when there's multiple phone numbers, extension and when the phone number is not 10 digits for all Phone Number related fields on the Summary Section. • Automated Testing Section is added	Kusnadi.E
8/14/2023	2.1	Design Clarification: • Added that the Referral Detail page will refresh after the user click on the Send-Email page. • Added a note on Section 2.1.3 to make it clear that anyone that have access to the Referral Detail page in view mode will be able to click on the Send E-mail button which will result in an email being sent to the provider/agency that is associated to the referral that is being viewed.	Kusnadi.E
8/16/2023	3.0	Content Revision 2: • On Section 2.1.3 #3	Kusnadi.E

		updated a sentence from the email body from: "If you need to get a hold of a county worker…" to "If you need to contact a county worker…."	

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1 OVERVIEW

The Child Care Administrator Portal was created to provide a read only summary that provide information needed to determine eligibility for childcare services as mandated by ACL-19-99 and ACL 19-110. This SCR will expand the Child Care Administrator portal to provide a summary page that provide referral information for services that the counties refer out to external agencies or providers.

1.1 Current Design

Currently, the Child Care Administrator Portal provide information to determine eligibility for childcare services. Secondly, when referrals are created in CalSAWS, counties are still required to manually provide the referral information to the external agencies, or providers for services they refer out.

1.2 Requests

Expand the Child Care Administrator Portal to provide a read only summary page to provide referral information that's inputted in CalSAWS to be available for external agencies or providers for services that are refer out.

1.3 Overview of Recommendations

1. Update the Referral Detail page to send e-mail out to resources when new referrals are created.
2. Update the CalSAWS.org resource section to rebrand the Child Care Portal title as CalSAWS Administrator portal.
3. Rebrand the Child Care Admin Portal as the CalSAWS Administrator Portal along with new pages for the referral portal functionality.
4. Create a new Security Role in ForgeRock that will provide user access to the Referral Portal pages of the CalSAWS Administrator Portal.
5. Create a new Referral API that will pull referral information from CalSAWS so it is being displayed on the Referral Portal pages of the CalSAWS Administrator portal.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out in the design.
2. This SCR will not impact any data/information/monthly report that are currently being used to determine eligibility for childcare services that are mandated by ACL 19-99 and ACL 19-110.
3. This SCR will not impact existing security for users that are currently provisioned to access the Child Care Administrator portal to determine eligibility for childcare services.
4. The functionality to validate Resource e-mail addresses will be added as part of SCR CA-253124. A subsequent SCR will be created to update the e-Referral functionality to only send to a validated e-mail address.

5. Users that will need to be added to ForgeRock application and be assigned to the security role that will provide them access to the CalSAWS Administrator portal will continue to be done by the delegated admin. It will continue to follow the existing process.
6. CA-263213 is the SCR that will update the CalSAWS Administrator Portal to allow external provider/agencies to update the referral status.
7. CA-263214 is the SCR that will update the existing URL for the Child Care Portal (to be rebranded as the CalSAWS Administrator portal) to match with the rebrand.
8. E-mail that's being sent to external provider/agency through CalSAWS application will be a HTML formatted email. The external provider/agency is assumed to be able to accept HTML formatted email messages.

2 RECOMMENDATIONS

Expand the Child Care Administrator portal to provide a read only summary page that provide referral information for services that the counties refer out to external agencies or providers. This will include rebranding the Child Care Administrator portal and adding a new referral flow along with new pages and security to allow external agencies, and providers to have a read only access to referral information that's created in CalSAWS. CalSAWS will be updated to support this new functionality so that e-mails can be sent out to external agencies and providers to inform them when new referrals are entered in CalSAWS. The calsaws.org resource page will also be updated to display a link to the portal that the external agencies and providers can access to view the information for the referrals.

2.1 Referral Detail page

2.1.1 Overview

The Referral Detail page allows users to add, edit or view the details of a referral for a participant/beneficiary. This SCR will add the functionality to send an e-mail out to the provider/agency for referral that are created in CalSAWS.

2.1.2 Referral Detail Mockup

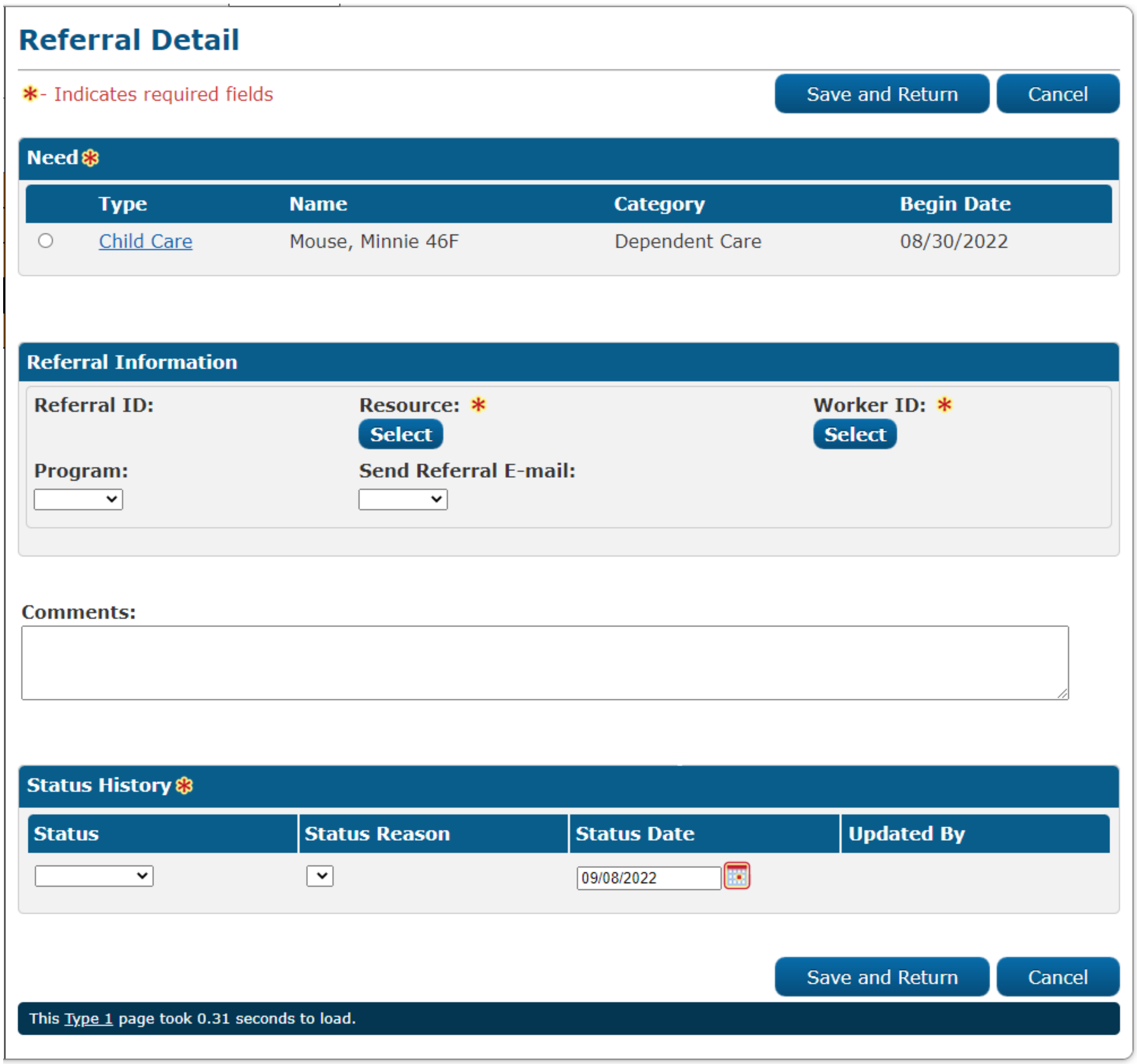

Figure 2.1.1 – Referral Detail (Create mode landing page – Reference only)

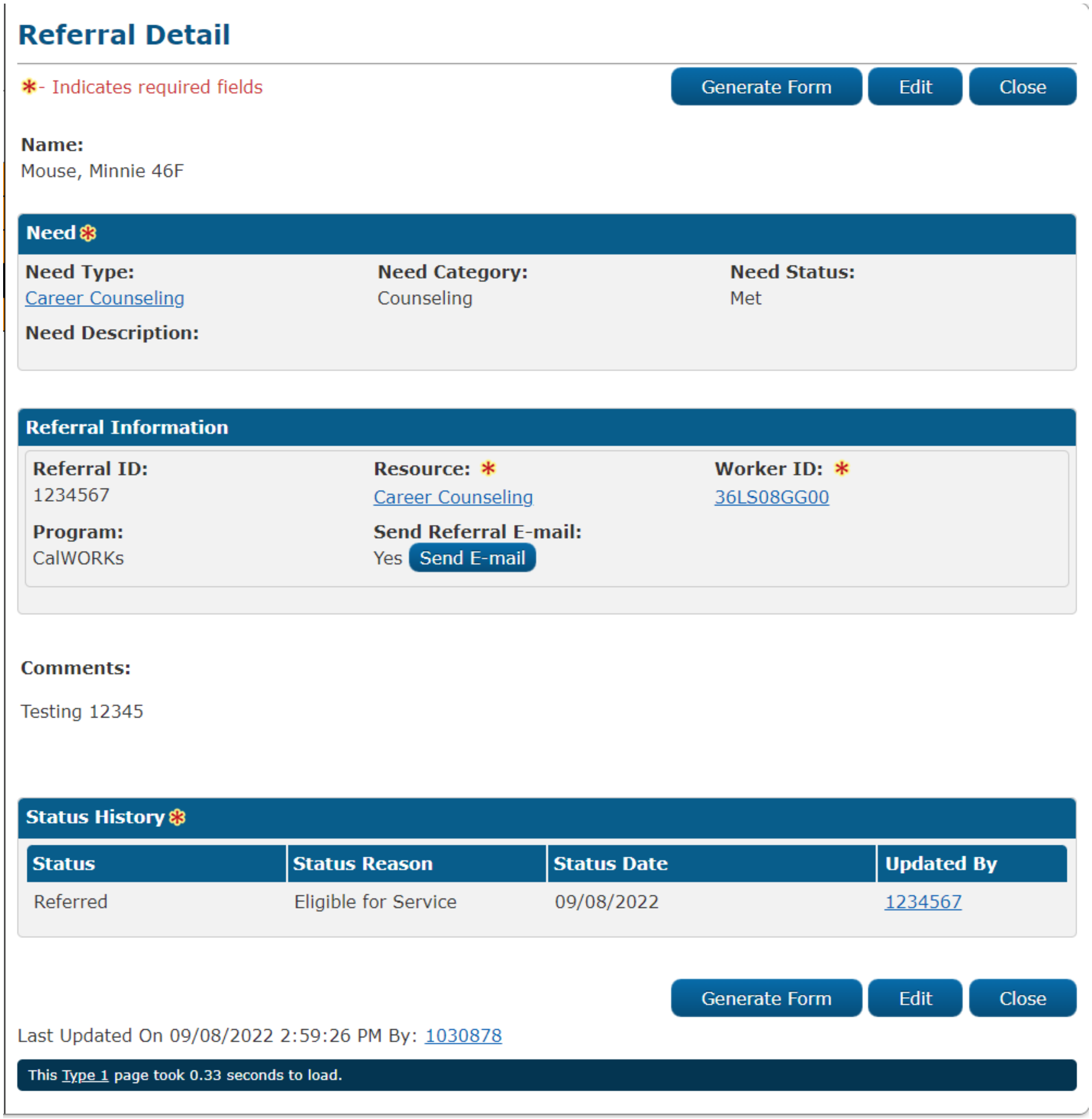

Figure 2.1.2 – Referral Detail (View mode)

2.1.3 Description of Changes

1. Display a button titled "Send E-mail" on the Send Referral E-mail field when the Referral Detail page is in view mode.
    a. "Send E-mail" button will only display when the value selected is "Yes" and the Resource selected have the "Does This Resource accept e-Referrals" field set to "Yes" on the Resource Detail page.
        i. Clicking the "Send E-mail" button will trigger CalSAWS to send an e-mail to the Resource that was selected on the

"Resource field" (please refer to requirement #4 on the e-mail that is to be sent to the Resource).

1. The e-mail will be sent to the e-mail address that is entered on the Resource Detail page under the Internet Information where the Type is equal to "E-mail".
    a. Multiple e-mail will be sent when there are multiple e-mail addresses with the Type of "E-mail".

ii. The Referral Detail page (in view mode) will refresh after the user clicks on the "Send E-mail" button.

Note: Users that have access to the Referral Detail page in view mode will have the ability to trigger CalSAWS to send an email out (please see below for details on the email that is being sent by CalSAWS) to the external Resource (Provider or Agency) that is associated to the Referral that is being viewed. This can be done by clicking the Send E-mail button, (if the E-mail button display on the page, please refer to above for details on when the button will display) as this button is not protected by any security right (if the user have access to the page in view mode they will have access to the Send E-mail button as long as the conditions are met on when they button should display).

2. Send out an e-mail to the Resource that is selected on the "Resource" field when the user clicks on the "Save and Return" button or the "Send E-mail" button.
    a. Send out the e-mail to the resource upon clicking the "Save and Return" button when the Referral Detail page is in create mode and the "Send Referral E-mail" field is equal to "Yes".
        i. The e-mail will be sent to the e-mail address that is entered on the Resource Detail page under the Internet Information where the Type is equal to "E-mail".
            1. Multiple e-mail can be sent when there's multiple e-mail addresses with the Type of "E-mail".
    b. Send out the e-mail to the resource upon clicking the "Save and Return" button when the Referral Detail page is in edit mode and the "Send Referral E-mail" field was changed from "No" to "Yes" or "blank" to "Yes".
        i. E-mail will not be sent to the resource when the value on the "Send Referral E-mail" field was changed from "Yes" to "No" or "Yes" to "blank".
        ii. E-mail will not be sent to the resource when there is no change in the value on the "Send Referral E-mail" field.
        iii. The e-mail will be sent to the e-mail address that is entered on the Resource Detail page under the Internet Information where the Type is equal to "E-mail".

            1. Multiple e-mail can be sent when there's multiple e-mail addresses with the Type of "E-mail".

3. Create a new e-mail to be sent to the Resource that was selected.
    a. Subject: A new service referral has been created from XX County
        i. XX will be the name of the County that the Referral belongs to.
        ii. Example:
            Email Subject: "A new service referral has been created from Riverside County"
    b. Body:
        A new service referral (Referral ID: XXXXX) has been created for you from XX County (##). Please log in to the CalSAWS Administrator Portal to view the referral information for more details. Please do not reply to this e-mail as this e-mail address is unmonitored. If you need to contact a county worker, please log in to the CalSAWS Administrator Portal for further information.
        i. The CalSAWS Administrator Portal will be a hyperlink to the CalSAWS Administrator Portal log in page (previously the Child Care Administrator Portal).
            1. Hyperlink will be: https://childcare.calsaws.net/
        ii. XXXX for the Referral ID will be the Referral ID assigned to the Referral.
        iii. XX for the County will be the name of the County that the referral belongs to and ## will be the County code.
        iv. Example:
            Email Body: "A new service referral (Referral ID: 123456) has been created for you from Riverside County (County Code: 33). Please log in to the CalSAWS Administrator Portal to view the referral information for more details. Please do not reply to this e-mail as this e-mail address is unmonitored. If you need to contact ~~get a hold of~~ a county worker, please log in to the CalSAWS Administrator Portal for further information.
    c. To: <e-mail address of the Resource>
        i. This is the e-mail address that is inputted on the Internet Section from the Resource Detail page where the Type is "E-mail"
    d. From: referral.noreply@app.calsaws.org
        i. Note: For Test environments, the e-mail address used is referral.noreply.dev@app.calsaws.org
4. Create a new e-mail address to be used by CalSAWS to send referral emails.
    a. For production environment, the e-mail address to be used by CalSAWS when sending the referral email will be: "referral.noreply@app.calsaws.org"

b. For test environment, the e-mail address to be used by CalSAWS when sending the referral email will be: "referral.noreply.dev@app.calsaws.org"

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

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

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Resources section of the CalSAWS.org website

2.2.1 Overview

The Resource section on the CalSAWS.org provide pertinent resources information that participants can use. This section also provides the link that Child Care Providers can use to access the Child Care Administrator Portal. This SCR will update the Resource section of the CalSAWS.org website to relabel the existing link for the Child Care Administrator Portal.

2.2.2 Resource section of the CalSAWS.org Mockup

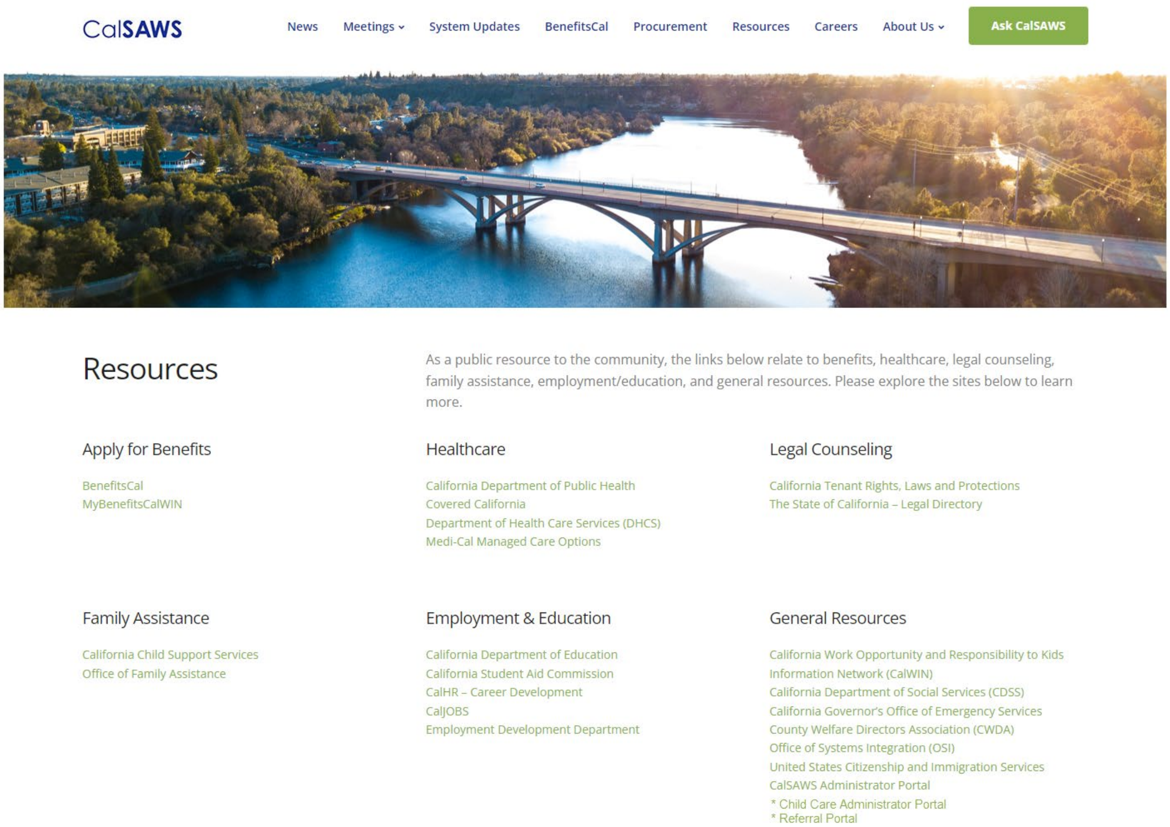

Figure 2.2.1 Resources section of the CalSAWS.org

2.2.3 Description of Changes

1. Update the label for the Child Care Administrator Portal link from "Child Care Administrator Portal" to
   "CalSAWS Administrator Portal
   * Child Care Administrator Portal
   * Referral Portal"
   a. Clicking this link will take the user to the production CalSAWS Administrator Portal website (as part of this SCR the Child Care Administrator Portal is rebranded as CalSAWS Administrator Portal).
      i. Website: https://childcare.calsaws.net/

2.2.4 Page Location

https://www.calsaws.org/resources/

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 CalSAWS Administrator Portal

2.3.1 Overview

The existing Child Care portal will be updated with a brand-new functionality to allow external Provider/Agency to view a summary for Referrals that are created in CalSAWS. This SCR will rebrand the Child Care Portal as the CalSAWS Administrator Portal and will add brand new pages that will display Referral information.

2.3.2 CalSAWS Administrator Portal Mockup

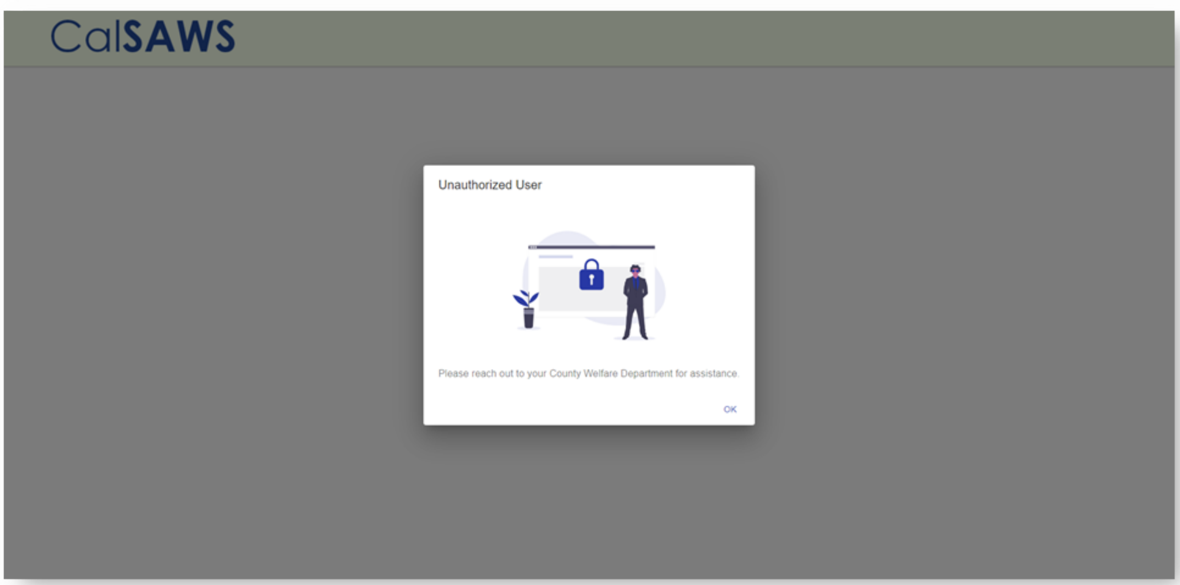

Figure 2.3.1 – Unauthorized User

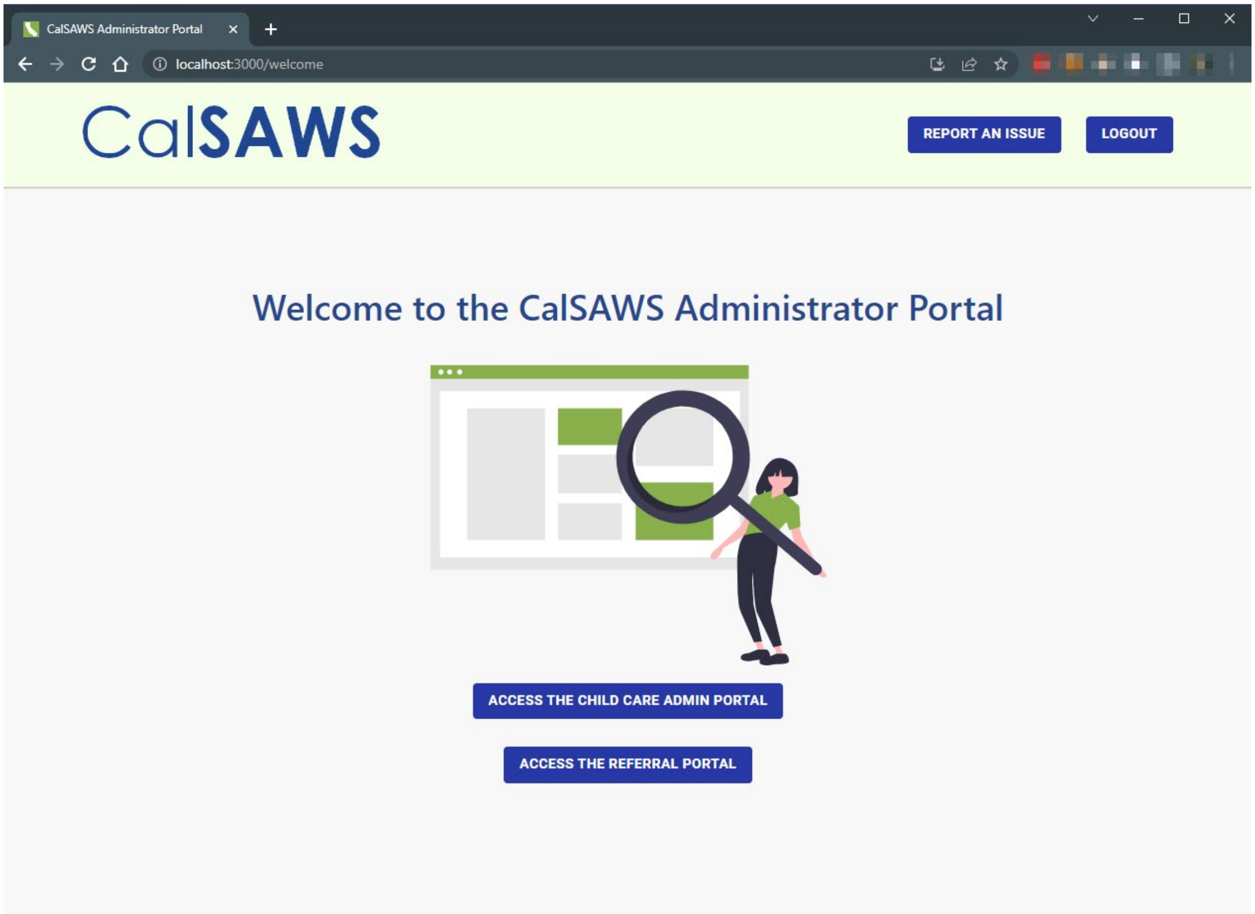

Figure 2.3.2 – Welcome Homepage

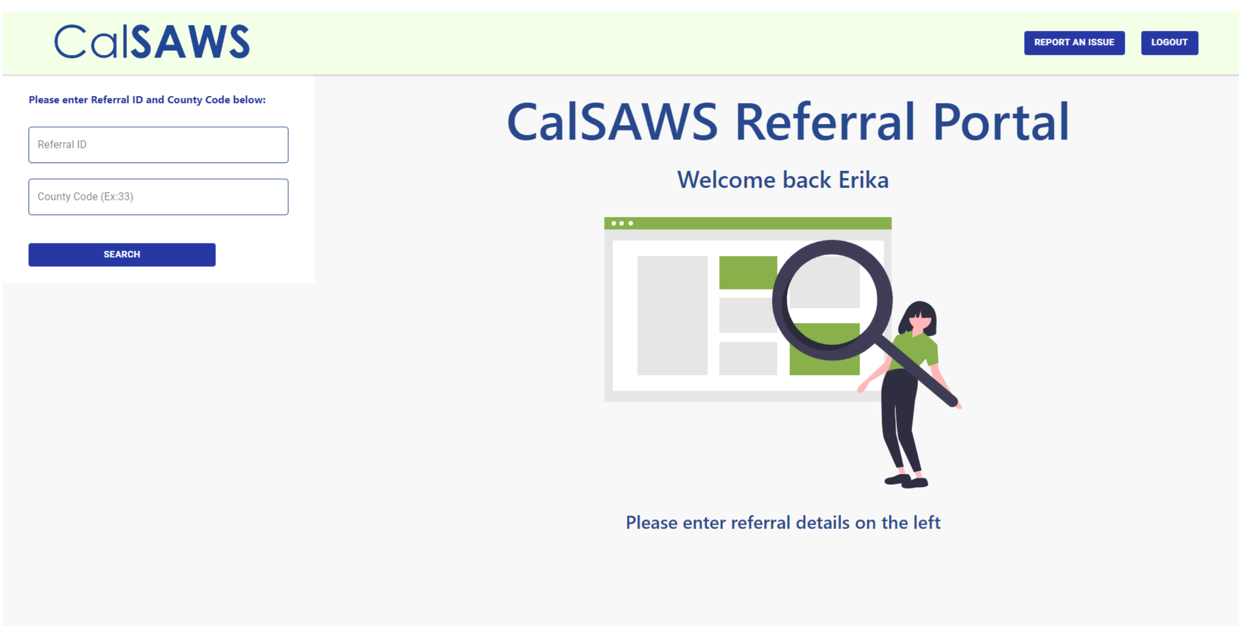

Figure 2.3.3 – Referral Portal Dashboard

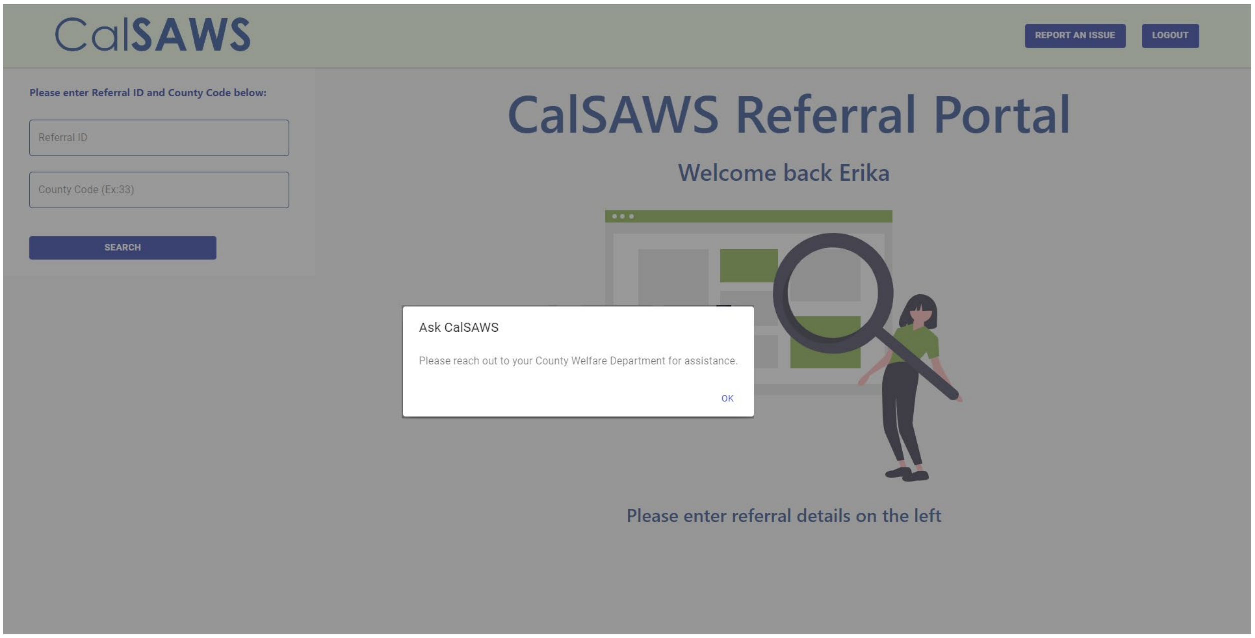

Figure 2.3.4 – Referral Portal Dashboard Report an issue modal

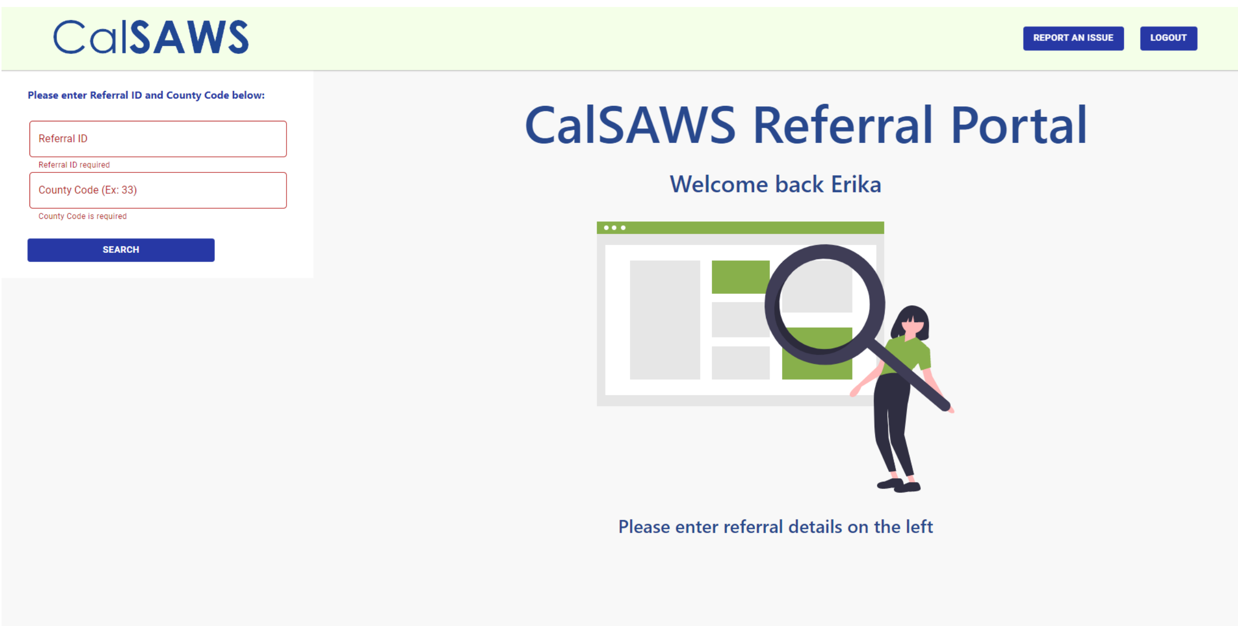

Figure 2.3.5 – Referral Portal Dashboard with required validation

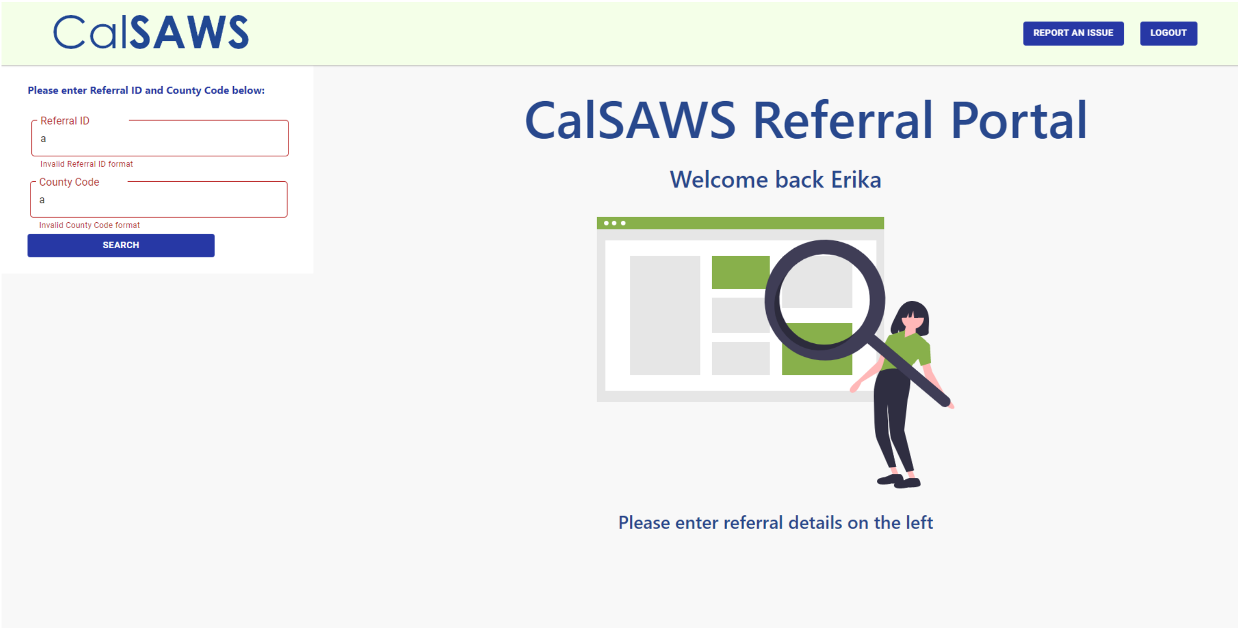

Figure 2.3.6 – Referral Portal Dashboard with not correct format validation

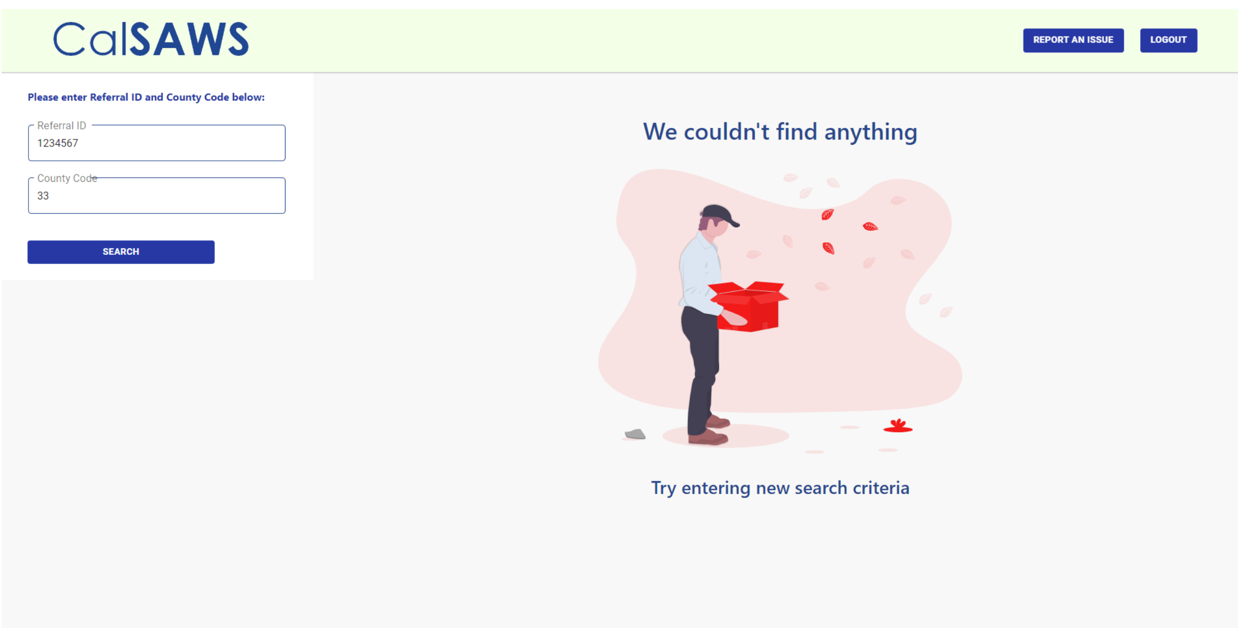

Figure 2.3.7 – Referral Portal Dashboard No Result found

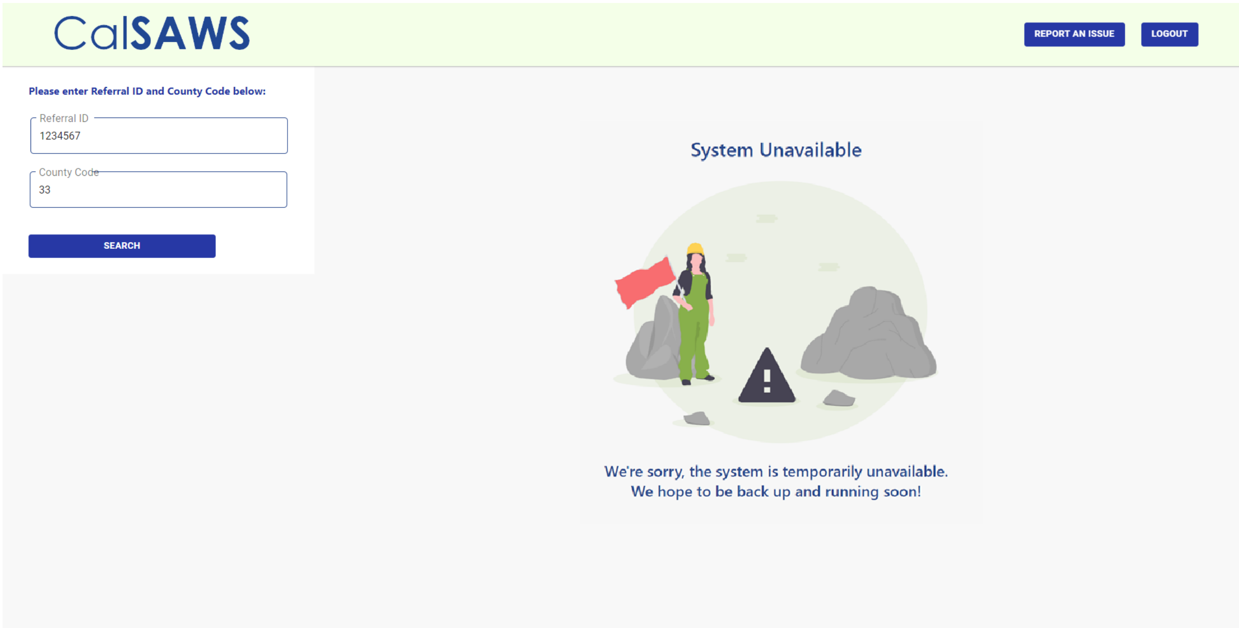

Figure 2.3.8 – Referral Portal Dashboard System Unavailable

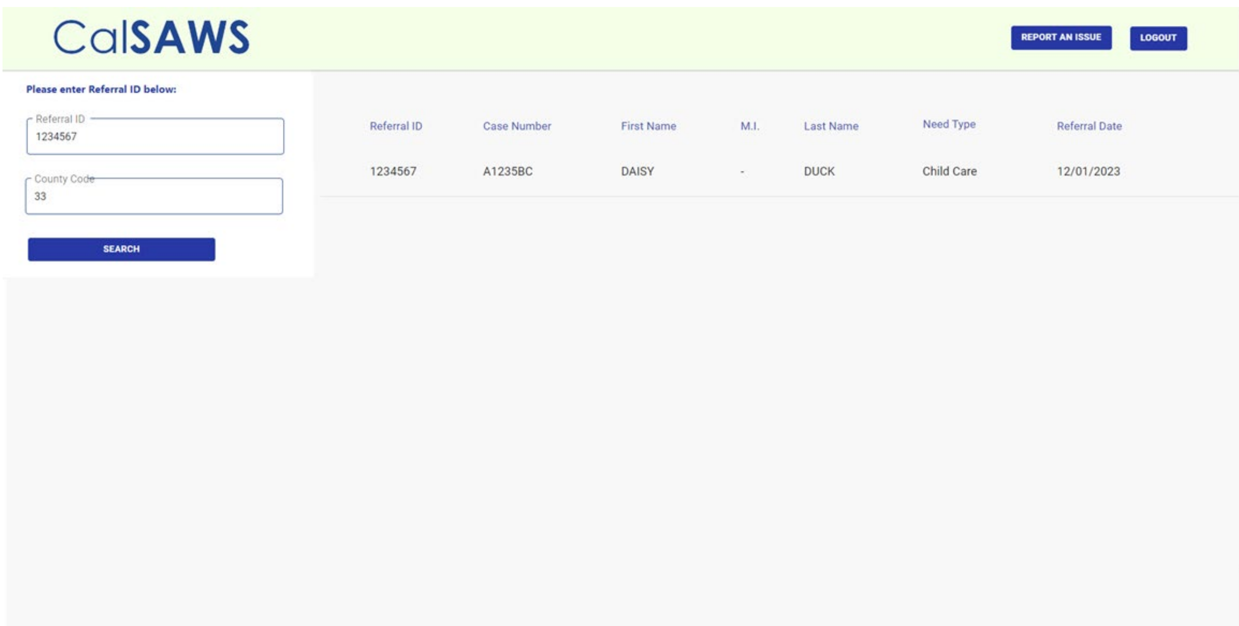

Figure 2.3.9 – Referral Portal Dashboard Result View

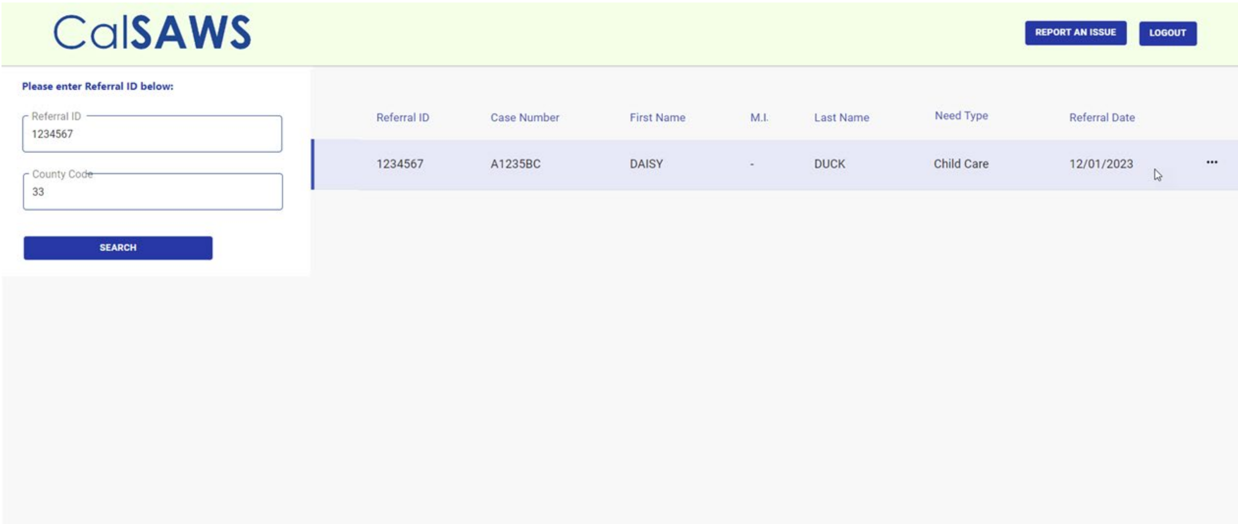

Figure 2.3.10 – Referral Portal Dashboard Result View with hover

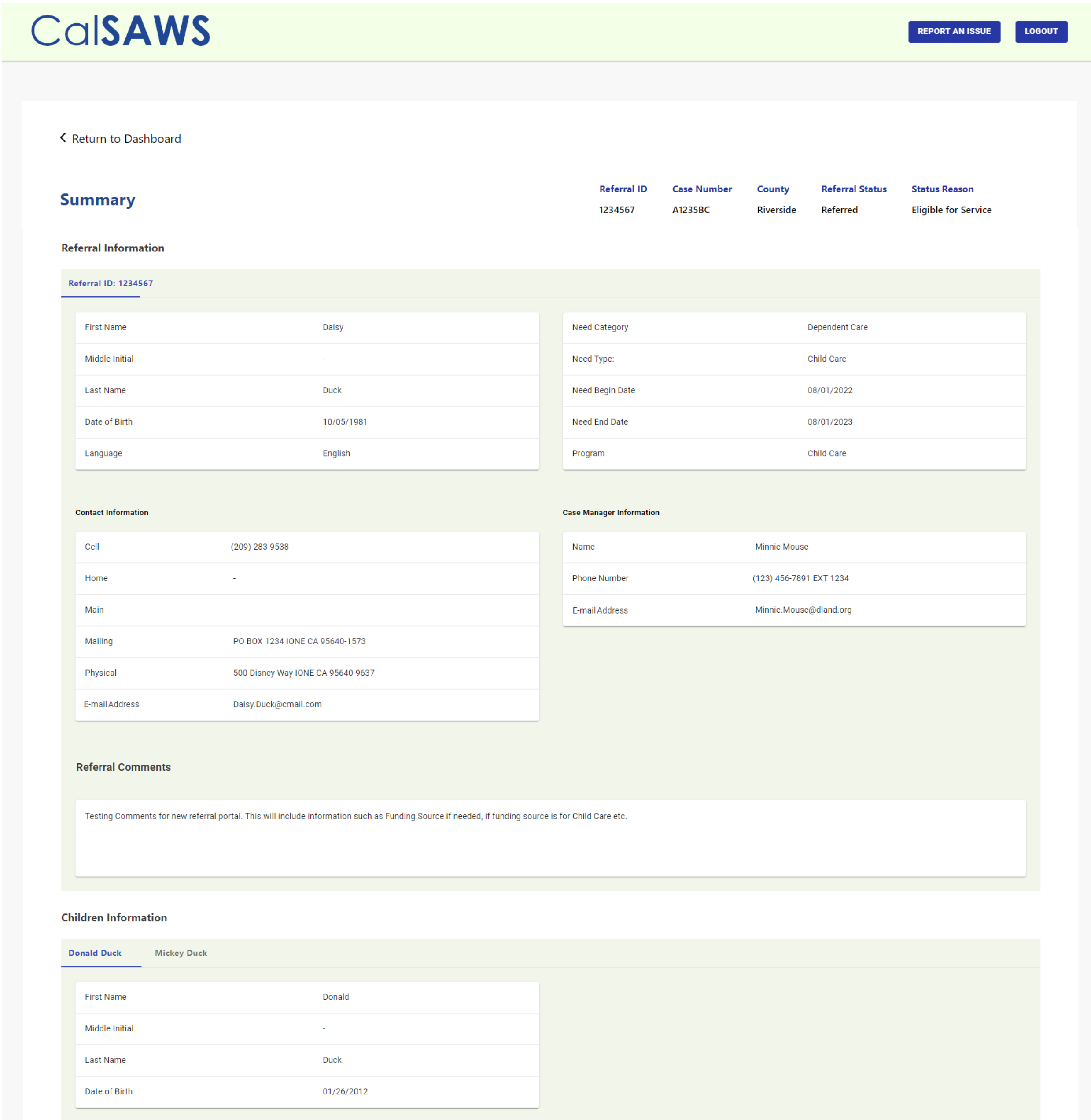

Figure 2.3.11 – Referral Portal Summary – Summary Section

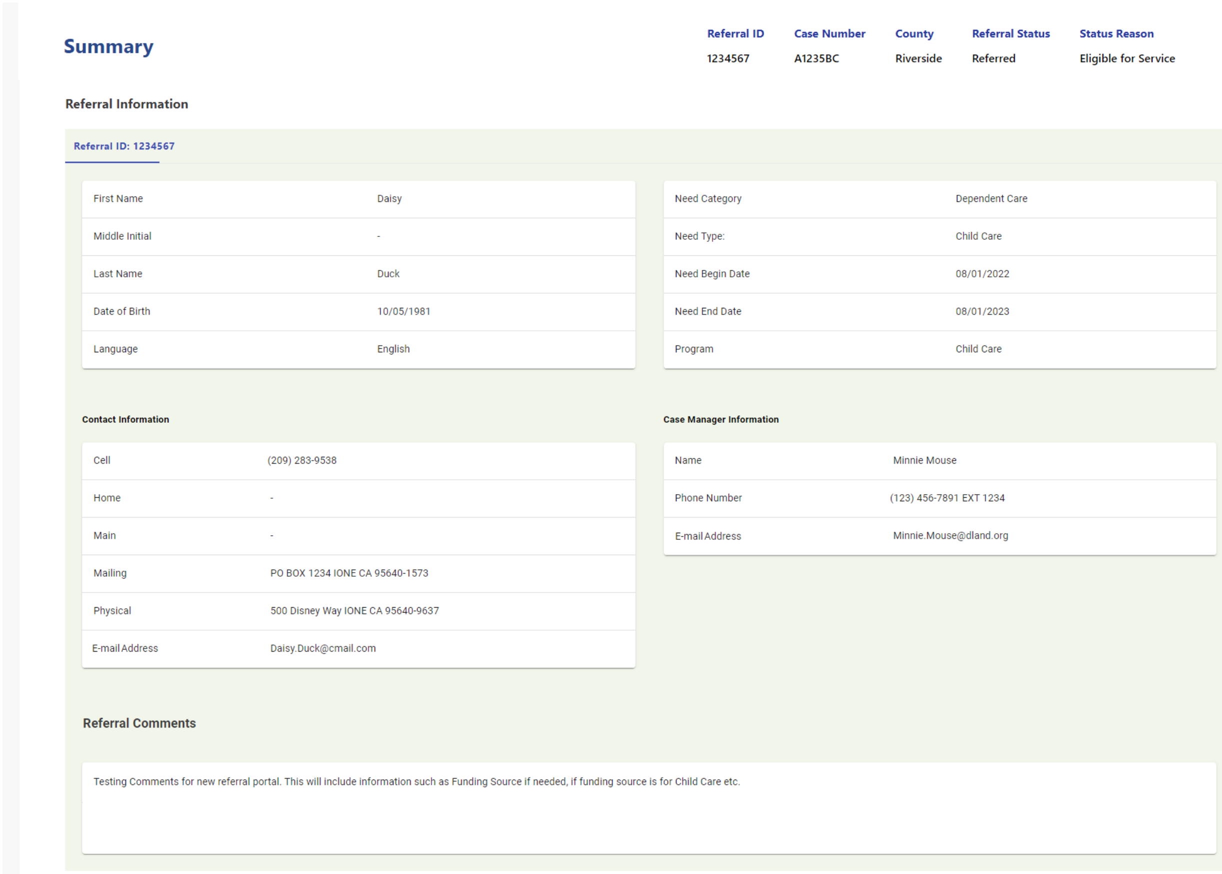

Figure 2.3.12– Referral Portal Summary – Referral Information Section

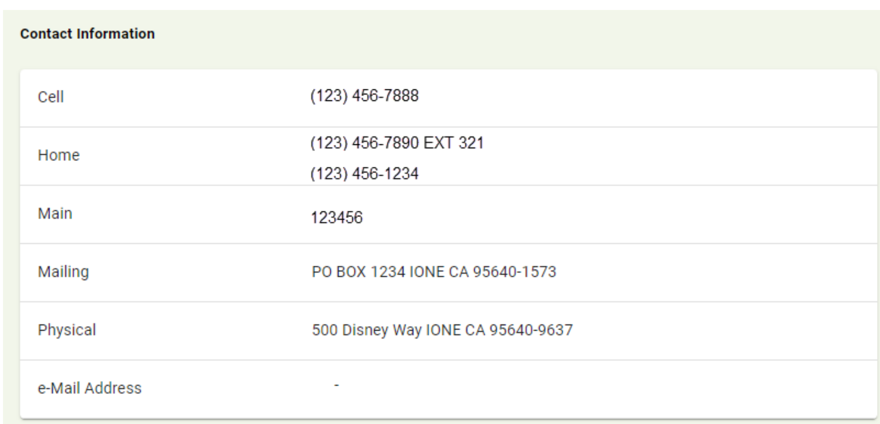

Figure 2.3.13 – Referral Portal Summary – Example when there’s more than 1 phone number and phone number is not 10 digits.

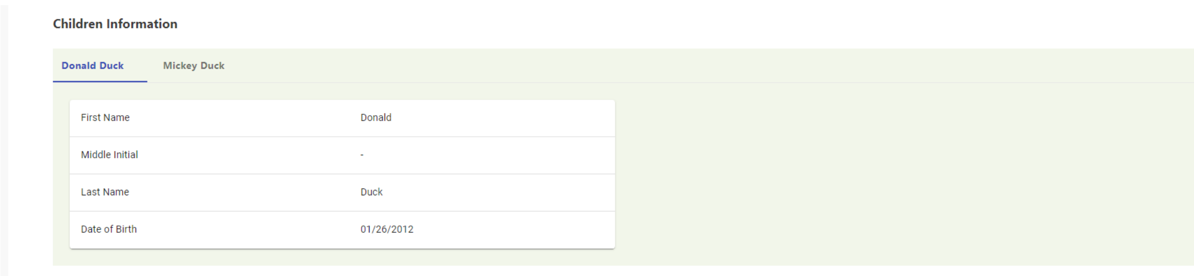

Figure 2.3.14 – Referral Portal Summary – Children Information

2.3.3 Description of Changes

1. Create a new Welcome Homepage that will allow users to access either the Child Care Administrator Portal or the Referral Portal.
    a. Create a Welcome Homepage that will display after the user logs in to the CalSAWS Administrator Portal.
        i. For users that have an 'Active' status in ForgeRock but are not assigned to at least one of the following security roles in ForgeRock: 'Child Care Portal User' or 'Referral Portal User' role, the page will display the unauthorized user message as shown on Figure 2.3.1.
            1. Clicking 'OK' on the dialog box will take the user back to the login page.
            2. The Header on the page when the unauthorized user message is being displayed will only have the CalSAWS logo on the left hand side.

        Note: This is the same unauthorized message that is currently being displayed on the portal, when the user has an Active status in ForgeRock but is not assigned to the 'Child Care Portal User' security role.
    b. Add a Header panel at the top of the page and will have the following:
        i. CalSAWS logo on the left-hand side of the Header panel
        ii. "REPORT AN ISSUE" button on the right-hand side of the Header Panel.
            1. Clicking this button will display the Report an Issue Modal Dialog that will display the following:
                a. Add the title: "Ask CalSAWS"
                b. Add text: "Please reach out to your County Welfare Department for assistance."
                c. Show an "OK" button.
                    i. Clicking on the button will dismiss the modal dialog.
                d. Clicking outside of the dialog, will close/dismiss it.

        Note: The Report an Issue Modal Dialog will work the same way as in the Child Care Administrator Portal.

iii. "LOGOUT" button on the right-hand side of the Header Panel, next to the "REPORT AN ISSUE" button.
    1. Clicking the "LOGOUT" button will end/invalidate the user's login session.
    2. User will be re-directed to the ForgeRock login page.

c. Display the following on the Welcome Homepage
    i. Title: "Welcome to the CalSAWS Administrator Portal"
    ii. Display the Search Image underneath the title.
        1. This is the same Search Image that is currently existing for the Child Care Administrator Portal.
    iii. Display the following buttons that will provide access to the Child Care Administrator Portal or the Referral Portal.
        1. Display a button titled "ACCESS THE CHILD CARE ADMIN PORTAL" for users that are assigned to the "Child Care Portal User" security role (this is a role that is assigned directly through the ForgeRock application).
            a. The "Child Care Portal User" security role is an existing security role within ForgeRock that is needed to access the Child Care Administrator Portal Dashboard page.
            b. Clicking the button will take the user to the existing Child Care Admin Portal Dashboard page.
            c. Users that are not assigned to the "Child Care Portal User" security role will not see the "ACCESS THE CHILD CARE ADMIN PORTAL" button.
        2. Display a button titled "ACCESS THE REFERRAL PORTAL" for users that are assigned to the "Referral Portal User" security role.
            a. This will be a new security role that will be created within ForgeRock that will allow users access to the Referral Portal Dashboard pages on the CalSAWS Admin Portal.
            b. Clicking the button will take the user to the Referral Portal pages (see below requirements for more details).
            c. Users that are not assigned to the "Referral Portal User" security role will not see the "ACCESS THE REFERRAL PORTAL" button.

        Note: Buttons that are displayed on the Welcome Homepage is dependent on the security role that the users are assigned to in ForgeRock. Dependent on their security role they might see one or both buttons being displayed on the page.

2. Create a new Dashboard page to search by Referral ID and County Code.
    a. This page will be protected by the "Referral Portal User" security role.
        i. This page is accessible by clicking on the "Referral Portal" button from the Welcome Homepage.
    b. Add a Header panel at the top of the page and will have the following:
        i. CalSAWS logo on the left-hand side of the Header panel
            1. Clicking the CalSAWS logo will take the user back to the Welcome screen.

           Note: This will also apply when users click the CalSAWS logo from the Child Care Portal pages.
        ii. "REPORT AN ISSUE" button on the right-hand side of the Header Panel.
            1. Clicking this button will display the Report an Issue Modal Dialog that will display the following:
                a. Add the title: "Ask CalSAWS"
                b. Add text: "Please reach out to your County Welfare Department for assistance."
                c. Show an "OK" button.
                    i. Clicking on the button will dismiss the modal dialog.
                d. Clicking outside of the dialog, will close/dismiss it.

           Note: The Report an Issue Modal Dialog will work the same way as in the Child Care Administrator Portal.
        iii. "LOGOUT" button on the right-hand side of the Header Panel, next to the "REPORT AN ISSUE" button.
            1. Clicking the "LOGOUT" button will end/invalidate the user's login session.
            2. User will be re-directed to the ForgeRock login page.
    c. Add a Search panel along the left edge of the page.
        i. Add instructive text "Please enter Referral ID and County Code below:"
        ii. Add a "Referral ID" text input box.
            1. The maximum number of characters allowed is 28.
                a. When the maximum number of characters is reached, no more characters can be entered.
        iii. Add a "County Code (Ex: 33) text input box.
            1. The maximum number of characters allowed is 2.

a. When the maximum number of characters is reached, no more characters can be entered.

iv. Add the following validations to require a Referral ID and County Code.
   1. Display the validation message "Referral ID is required" when the user clicks on the Search button and no values are entered on the "Referral ID" textbox.
   2. Display the validation message "County Code is required" when the user clicks on the Search button and no values are entered on the "County Code" textbox.

v. Add the following validations when the value entered on the Referral ID and County Code text box are not in numeric format.
   1. Display the validation message "Invalid Referral ID format" when the user enters a value that is not numeric on the Referral ID textbox.
   2. Display the validation message "Invalid County Code format" when the user enters a value that is not numeric on the County Code textbox.

vi. Add a "Search" button.
   1. Clicking this button will verify the user's logged in session is still valid; if not, re-direct the user to the login page.
   2. Execute the search using the Referral ID and the County Code entered to search the CalSAWS database.
      a. Display the search result based on the Referral ID and County Code entered on the search parameter (please see #d below for more details on the Result panel).
      b. Display the No Result View on the Result panel when there's no result being returned based on the Referral ID and County Code entered on the search parameter (Please see #d below for more details).

d. Add a Results panel, on the right side of the page.

i. Create a No Result View on the Result panel when a search does not return a result based on the Referral ID and County Code search parameters.
   1. If a search does not return any results, display a No Results message in the Results panel:
   2. Display text: "We couldn't find anything"
   3. Display the No Results image
   4. Display text: "Try entering new search criteria"

ii. Create a System Unavailable View.

1. The page will display when an error occurs, on searching or on loading the Summary page.
    a. An "error" is anything that is being returned by the webservice that does not fall into the scenario of requirement d.i. above (which will result in a No Result View) or requirement d.iii below (which will result in a Result View).
2. Display text: "System Unavailable"
3. Display the System Unavailable image.
4. Display text: "We're sorry, the system is temporarily unavailable. We hope to be back up and running soon!"

iii. Create a Result View on the Result panel when a search returns a result based on the Referral ID and County Code that was entered.
1. Result View will display a Results table in the Result panel. Add column headers for:
    a. Referral ID
        i. Display the Referral ID
    b. Case Number
        i. Display the Case Number that the referral was created for.
    c. First Name
        i. Display the first name of the person that the need associated to the referral is created for.
    d. M.I.
        i. Display the middle initial of the person that the need associated to the referral was created for.
    e. Last Name
        i. Display the last name of the person that the need associated to the referral was created for.
    f. Need Type
        i. Display the need type for the referral.
    g. Referral Date
        i. Display the date that the referral was created.
            1. This will display in the format of MM/DD/YYYY
    h. Blank Header
        i. On hovering over a record/row, this column will hold an ellipsis (…) link, for navigating to the Summary page

2. If data for a field is unavailable, show a dash "-" for the value
3. On hovering over a record/row, temporarily:
    a. Highlight the record/row
    b. Show an ellipsis (…) link, under the Blank header column; on clicking the ellipsis:
    c. Re-direct the user to the Summary page for the selected record.

e. Show a Welcome message in the Result panel, until/unless the user initiates a search
    i. Display a text "CalSAWS Referral Portal" at the top of the Result panel.
    ii. Display a text "Welcome back" + "{User_First_Name}"
        1. User First Name will be the First name of the logged in user.
    iii. Display the Search image
    iv. Display the text "Please enter referral details on the left".

3. Create a new Summary page, to show detailed information about a record.
    a. Protect this page with the "Referral Portal User" security role
    b. Carry over the Top Header as described in the Dashboard page.

        Note: As mentioned above on #2, clicking the CalSAWS logo will take the user back to the Welcome page.

    c. Add a left arrow icon and text: "Return to Dashboard"; on clicking, re-direct the user to the Dashboard page.
        i. The Dashboard page will display the result view information that was returned based on the search parameters, prior to the user accessing the Summary page.
        ii. The Referral ID and County Code text fields will be blank.

        Note: This will work like the Child Care Admin Portal, when the user clicks on the Return to Dashboard from the Summary page.

    d. Add a section titled 'Summary'.
        i. Add a 'Referral ID' label and the Referral ID of the selected record.
        ii. Add a 'Case Number' label and the Case Number of the selected record.
        iii. Add a 'County' label and the County information that the Case of the selected record belongs to.
        iv. Add a 'Referral Status' label and the Referral Status of the selected record.
            1. When the Summary page first loads, it will display a text of the latest Referral Status.
                a. When the page initially loads, the latest status will be based on the information that

is being pulled from the CalSAWS database.

v. Add a 'Status Reason' label and the Status Reason of the selected record.
    1. When the Summary page first loads it will display a text of the latest Status Reason.
        a. When the page initially loads, the latest Status Reason will be based on the information that is being pulled from the CalSAWS database.

e. Add a 'Referral Information' section.
    i. The 'Referral Information' section will have a sub section titled 'Referral ID: xxxxx
        1. xxxxx will be the Referral ID of the record selected.
        2. On the left-hand side display the following information:
            a. First Name
                i. This will display the First name of the person that the Need for the Referral is created for.
            b. Middle Initial
                i. This will display the Middle initial of the person that the Need for the Referral is created for.
                ii. If the person does not have a middle initial display a "-".
            c. Last Name
                i. This will display the Last name of the person that the Need for the Referral is created for.
            d. Date of Birth
                i. This will display the Date of Birth of the person that the Need for the Referral is created for.
                    1. This will be in the format of MM/DD/YYYY
            e. Language
                i. This will display the Primary language of the Person that the Need for the Referral is created for.
                Note: This is the value selected on the Spoken Language field from the Individual Demographics Detail page in CalSAWS.
        3. On the right-hand side display the following information:
            a. Need Category

        i. This will display the Need Category that is associated to the Referral.
    b. Need Type
        i. This will display the Need Type that is associated to the Referral.
    c. Need Begin Date
        i. This will display the Begin Date for the Need that is associated to the Referral.
        ii. This will display in the format of MM/DD/YYYY
    d. Need End Date
        i. This will display the End Date for the Need that is associated to the Referral.
        ii. This will display in the format of MM/DD/YYYY
    e. Program
        i. This will display the Program that is associated to the Referral.
        ii. If the referral does not have a Program associated to it display a "- ".

ii. The 'Referral Information' section will have a sub section titled 'Contact Information' on the left-hand side that will display the Contact information of the Person that the Need for the Referral is created for and will display the following information:

1. Cell
    a. This will display the Cell Phone Number of the Person that the Need for the Referral is created for.
        i. This will display in the format of (XXX) XXX-XXXX
            1. Example: (123) 567-8910
        ii. If the phone number does have an extension, the page will also display the extension information and will have the format of (XXX) XXX-XXXX EXT XXX
        Note: EXT will only display if an extension does exist.
    b. If the person does not have a Cell Phone Number display as "-".
    c. If the person have multiple phone number for the same Type, all phone numbers will be displayed.

        d. For phone numbers inputted in CalSAWS that's not ten digits, the phone number will display, but will not be in the format of (XXX) XXX-XXXX.
2. Home
    a. This will display the Home Phone Number of the Person that the Need for the Referral is created for.
        i. This will display in the format of (XXX) XXX-XXXX
            1. Example: (123) 567-8910
        ii. If the phone number does have an extension, the page will also display the extension information and will have the format of (XXX) XXX-XXXX EXT XXX
            Note: EXT will only display if an extension does exist.
    b. If the person does not have a Home Phone Number display as "-".
    c. If the person have multiple phone number for the same Type, all phone numbers will be displayed.
    d. For phone numbers inputted in CalSAWS that's not ten digits, the phone number will display, but will not be in the format of (XXX) XXX-XXXX.
3. Main
    a. This will display the Main Phone Number of the Person that the Need for the Referral is created for.
        i. This will display in the format of (XXX) XXX-XXXX
            1. Example: (123) 567-8910
        ii. If the phone number does have an extension, the page will also display the extension information and will have the format of (XXX) XXX-XXXX EXT XXX
            Note: EXT will only display if an extension does exist.
    b. If the person does not have a Main Phone Number display as "-".
    c. If the person have multiple phone number for the same Type, all phone numbers will be displayed.
    d. For phone numbers inputted in CalSAWS that's not ten digits, the phone number will

display, but will not be in the format of (XXX) XXX-XXXX.

4. Mailing
    a. This will display the Mailing Address of the Person that the Need for the Referral is created for.
        i. This will display in the format of Address Line 1 Address Line 2 (when one is available) City State Postal Code-Postal Code Suffix (when one is available).
            1. Example of Address with no Address Line 2 information and Postal Code Suffix: 500 Disneyland Way Anaheim CA 90210
            2. Example of Address with Address Line 2 and Postal Code Suffix: 500 Disneyland Way APT#2 Anaheim CA 90210-1234
    b. If the person does not have a Mailing Address display as "-".
5. Physical
    a. This will display the Physical Address of the Person that the Need for the Referral is created for.
        i. This will display in the format of Address Line 1 Address Line 2 (when one is available) City State Postal Code-Postal Code Suffix (when one is available).
            1. Example of Address with no Address Line 2 information and Postal Code Suffix: 500 Disneyland Way Anaheim CA 90210
            2. Example of Address with Address Line 2 and Postal Code Suffix: 500 Disneyland Way APT#2 Anaheim CA 90210-123
    b. If the person does not have a Physical Address display as "-".
6. E-mail Address
    a. This will display the E-mail address of the Person that the Need for the Referral is created for.

b. If the person does not have an E-mail address display as “-“.

iii. The ‘Referral Information’ section will have a sub section titled ‘Case Manager Information’ on the right-hand side that will display the worker information associated to the referral and will display the following information:

1. Name
   a. This will display the Name of the Worker associated to the Referral.
   b. It will display in the format of First Name Middle Initial Last Name
   c. If the Referral is not associated to a Worker or the Position is not associated to a Staff display as “-“.

   Note: The Name of the Worker will be the name of the Staff that is associated to the Position (Worker ID).

2. Phone Number
   a. This will display the Main Phone number and the extension (if information is available) of the Worker associated to the Referral.
   b. It will display in the format of (xxx) xxx-xxxx EXT ####
      i. The EXT and #### will not display when there is no Extension.
         1. Example without extension: (123)456-7891
      ii. Example with extension: (123)456-7891 EXT 1234
   c. If the Referral is not associated to a Worker display as “-“.
   d. If the worker have multiple phone number for the same Type, all phone numbers will be displayed.
   e. For phone numbers inputted in CalSAWS that’s not ten digits, the phone number will display, but will not be in the format of (XXX) XXX-XXXX.

   Note: The Phone number is the Main Phone Number Type that is associated to the Position.

3. E-Mail Address
   a. This will display the E-mail address of the Worker associated to the Referral.
   b. If the Referral is not associated to a Worker or the Position is not associated to a Staff display as “-“.

Note: The e-Mail address of the Worker will be the E-mail address of the Staff that is associated to the Position (Worker ID).

f. Add a section titled 'Referral Comments'.
    i. Display a text box that will have the Comment information that was entered for the Referral.
g. Add a section titled 'Children Information'
    i. This section will have a tab for each Child that is selected for the referral.
        1. This section will only display when there are children that are associated to the referral.
    ii. Label each tab as: {First_Name} + "{Middle Initial} " + {Last_Name}; append the name suffix if child has a suffix.
        1. Middle initial will display if one is available.
        2. Examples: Donald Duck, Donald M Duck, Donald, Donald M Duck Jr
    iii. Order the tabs by Date of Birth with the oldest person on the left; use First Name for a secondary sort, in ascending order, if needed.
    iv. Clicking the tab will display the information for that specific child and will display the following information:
        a. First Name
            i. This will display the First name of the child.
        b. Middle Initial
            i. This will display the Middle initial of the child.
            ii. If the person does not have a middle initial display a "-".
        c. Last Name
            i. This will display the Last name of the child.
        d. Date of Birth
            i. This will display the Date of Birth of the child.
                1. This will be in the format of MM/DD/YYYY

4. Update the Window title from the "Child Care Administrator Portal" to "CalSAWS Administrator Portal".

2.3.4 Page Location

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

2.3.5 Security Updates – ForgeRock

1. Security Role

Security Role	Role Description
Referral Portal User	Allow users to access the Referral Portal section of the CalSAWS Administrator Portal.

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 ForgeRock Application – New Security Role

2.4.1 Overview

The Delegated Administration feature within the ForgeRock application grants delegated administrators the abilities to create users, modify users (roles and details), disable users, assign users to groups, and grant other users' administrative privileges. A delegated administrator is a user who is granted admin-level privileges to carry out these functions. As part of this SCR, a brand-new Security Role will be created within ForgeRock application that will allow the delegated administrator to assign users to the new security role that will grant them access to the CalSAWS Administrator Portal and access to the Referral portal pages.

2.4.2 Description of Changes

1. Create a brand-new user role for the CalSAWS Administrator portal for the Referral Portal.
   a. New Role Name: "Referral Portal User"
   b. New Role Description: "Access to the CalSAWS Admin Portal – Referral"

2.4.3 Page Location

ForgeRock Application.

2.5 Referral API

2.5.1 Overview

The Referral API is a RESTful webservice that will pull referral information from the CalSAWS database to the CalSAWS Administrator portal.

2.5.2 Description of Change

1. Create a new RESTful Referral API webservice for the CalSAWS Administrator Portal in the GET method for a matched Referral ID and County Code and will send the following Referral form attributes.
    a. Referral Attributes – These are the attributes that the CalSAWS Administrator Portal will display on the new Referral Portal section.
        i. Refer to the Supporting Documents section (Section 3) for the Referral API data field mapping.

Attribute	Description
Referral ID	The Referral ID that information is being requested from. Note: This is the CalSAWS generated identifier for the referral.
Case Number	The Case Number that the Referral is created for.
County	The name of the County that the Case for the referral is created for.
Referral Status	The latest Referral Status for the Referral. The status will include the following: Referred, Accepted, Not Accepted.
Status Reason	The latest Status Reason for the Referral. The status reason will include the following: Eligible for Service, Funding Available, Resource Available, Funding Not Available, No Resource Available.
First Name	The First Name of the Person that the Referral is created for.
Middle Initial	The Middle Initial of the Person that the Referral is created for.
Last Name	The Last Name of the Person that the Referral is created for.
Date of Birth	The Date of Birth of the Person that the Referral is created for.
Language	The primary language of the Person that the Referral is created for.

	Note: Please refer to swagger document on the possible options.
Need Category	The Need Category associated to the Referral. Note: Please refer to swagger document on the possible options.
Need Type	The Need Type associated to the Referral. Note: Please refer to swagger document on the possible options.
Need Begin Date	The Need Begin Date that is associated to the Referral.
Need End Date	The Need End Date that is associated to the Referral.
Program	The Program information for the Referral.
Cell	The Cell Phone number of the Person that the Referral is for.
Home	The Home Phone number of the Person that the Referral is for.
Main	The Main Phone Number for the Person that the Referral is for.
Mailing	The Mailing Address for the Person that the Referral is for. Note: This will include the full address (Street Name, City, State, and Zip Code)
Physical	The Physical Address for the Person that the Referral is for. Note: This will include the full address (Street Name, City, State, and Zip Code)
e-Mail Address	The e-Mail address for the Person that the Referral is for.
Worker Name	The First and Last name of the Worker that is associated to the Referral.
Worker Phone Number	The Phone Number of the Worker that is associated to the Referral
Worker e-Mail Address	The e-Mail address of the Worker that is associated to the Referral
Referral Comment	Comment information for the Referral.
Child First Name	The First Name of the Child associated to the Referral.
Child Middle Initial	The Middle Initial of the Child associated to the Referral.
Child Last Name	The Last Name of the Child associated to the Referral.
Child Date of Birth	The Date of Birth of the Child associated to the Referral.

2.5.3 Partner Integration Testing

No

2.5.4 Execution Frequency

Real-Time web service

2.5.5 Key Scheduling Dependencies

N/A

2.5.6 Counties Impacted

CalSAWS

2.5.7 Category

N/A

2.5.8 Data Volume/Performance

N/A

2.5.9 Interface Partner

N/A

2.5.10 Failure Procedure/Operational Instructions

N/A

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to verify the availability of the "Send E-mail" button on the Referral Detail page, and the primary functionality of the rebranded "CalSAWS Administrator Portal". Update existing regression scripts that reference the "Child Care Administrator Portal" to use the new name.

Technical Note: The functionality of the "Send E-mail" button is out of scope for automation and will need to be manually tested.

2.6.2 Description of Change

1. Create new regression scripts to verify the availability of the "Send E-mail" button when the field value is "Yes" in view mode.
   Technical Note: Clicking the "Send E-mail" button and verifying receipt of the email message(s) is out of scope for automation and will need to be manually tested.
2. Create new regression scripts to verify the new functionality of the CalSAWS Administrator Portal related to Referrals.
   Technical Note: System testing of this functionality will be automated where feasible, with the remaining scenarios to be executed manually. The specific test scenarios, and breakout between those that are and are not candidates for automation, will be determined per the system test process during the development phase.
3. Update existing regression scripts that reference the "Child Care Administrator Portal" to use the new Portal name ("CalSAWS Administrator Portal").
4. Update the log-in functionality of the existing regression scripts that reference the "Child Care Administrator Portal", to click through the Welcome Homepage.
   Technical Note: This will be implemented in one of two ways depending on the specific security layout of the automated test account at the time of implementation: Either (1) within the log-in functionality of the CAT Framework, or (2) at the individual script level.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	This attachment will contain the referral API data field mappings.	Data Dictionary for CA-263212.xlsx
2	Interface	Referral-API YAML	Referral-API.yaml
3	Interface	Referral-API YAML	Referral-API.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.15.11	The LRS shall generate the appropriate referrals at the time of case approval,	CalSAWS will be updated to allow e-referrals to be

	based on information entered and programs requested.	generated. This SCR will add the functionality to CalSAWS to send out email to the provider/agency that was selected on the referral. This SCR will also update the existing Child Care Admin Portal with a new functionality for external providers/agency to see referral information that's created in CalSAWS.