CalSAWS

California Statewide Automated Welfare System

Design Document

CA-235210

Homeless Temp AU Size Based on CalWORKs AU Size Calculation

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/27/2023	1.0	Initial Document	Yale Yee
11/1/2023	2.0	Content Revision to remove status reasons from sanctions section.	Yale Yee

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1 OVERVIEW

1.1 Current Design

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

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

1.2 Requests

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

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

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

a. A non-citizen applicant who does not provide verification of their eligible non-citizen status; or

b. A person with no eligible children or verified pregnancy; or

c. A person who is sanctioned.

1.3 Overview of Recommendations

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

1.4 Assumptions

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

2   RECOMMENDATIONS

2.1   Update HT EDBC AU Size Calculation

2.1.1   Overview

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

(1) A non-citizen applicant who does not provide verification of their eligible non-citizen status; or

(2) A person with no eligible children who does not provide medical verification of pregnancy; or

(3) A person who is sanctioned.

2.1.2   Description of Changes

Add the following status reasons to the HT EDBC determination:

1. A non-citizen applicant who does not provide verification of their eligible non-citizen status:
    a. Ineligible Non Citizen

2. A person with no eligible children or verified pregnancy:
    a. CW - No Elig Child

3. A person who is sanctioned:
    a. Refused Assign Supp Rights
    b. FTP INS Document
    c. ~~Didn't Sign WTW~~
    d. CW Non Part.
    e. FTP Sponsor SOF
    f. FTP Sponsor Dependents
    g. SSN Enumeration
    h. FTP Sponsor Property
    i. FTP Sponsor Income
    j. FTP Age Verification
    k. Refuse to Comply Sponsorship
    l. SAR 22 Form Not Received
    m. Sponsor Meeting Needs
    n. ~~Sponsor and family resources over limit~~

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

2.1.3 Programs Impacted

Homeless - Temp

2.1.4 Performance Impacts

N/A

3 OUTREACH

3.1 Lists

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

(1) A non-citizen applicant who does not provide verification of their eligible non-citizen status; or

(2) A person with no eligible children who does not provide medical verification of pregnancy; or

(3) A person who is sanctioned.

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

(1) A non-citizen applicant who does not provide verification of their eligible non-citizen status; or

(2) A person with no eligible children who does not provide medical verification of pregnancy; or

(3) A person who is sanctioned.

Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s): Benefit Month, Household Size, Person Name
Frequency: One-time

The list will be posted to the following locations:

System	Path

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-56518

Add the M16-705 - EBT Adjustment Denial (08/08)

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Maria Jensen
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/04/2022	0.1	Initial Draft	Maria Jensen
08/10/2022	0.2	Fiscal input	Maria Jensen, Eric Wu, Sidhant Garg
09/23/2022	0.3	Removed Rec #3, reintroduced Rec #2	Maria Jensen
11/01/2022	0.4	Rec #1 will only add Batch trigger; TEMP NA 1238 var pop	Maria Jensen
12/01/2022	0.5	Added note for CT942 Updated Overview to match scope Updated TEMP NA 1238 title	Maria Jensen
12/02/2022	0.6	QA comments: -Current Design: added M16-701 suppression, M16-705 langs -Recc: added 3rd criterion for M16-705 batch - described MISDIS -4.1 added Batch gen for M16-701	Maria Jensen
01/16/2022	0.7	QA Comments: Added items to Template Repository programs list for M16-705 Completed triggers for M16-701 Added default value for M16-705 input text	Maria Jensen
02/02/2023	0.8	Added Section 2.3 for IPT Testing Finalized variables	Jimmy Tu Maria Jensen
03/22/2023	0.9	Added Counties for M16-705 Batch generation	Maria Jensen
03/29/2023	1.0	Batch Job numbers for opt-in Counties	Jimmy Tu
04/05/2023	1.1	Addressing Committee comments, Sections 1.1, 1.4, 2.1.1, 2.1.4.2	Maria Jensen
04/14/2023	1.2	Addressing Committee comments, Sections 1.1, 1.2, 2.1.4	Maria Jensen Caroline Bui

4/26/2023	1.3	Update Section 2.3 #1-3 to include the form generations mentioned in Section 2.1.4 #1 and Section 2.2.4 #1.	Jimmy Tu
08/09/2023	1.4	Updates to include recommendation for M16-701 and removing stored procedure.	Phong Xiong
08/29/2023	1.5	Updated as per build comments on section 2.3.3	Phong Xiong
08/30/2023	1.6	Content Revision – Added to section 2.1 to update the form to the latest state version and turn off threshold languages	Phong Xiong
09/18/2023	1.7	Content Revision – Updated section 2.3.2 to update the Imaging Form Title for the TEMP NA 1238.	Phong Xiong

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1 OVERVIEW

This SCR will add batch generation to the M16-705 - EBT Adjustment Denial (08/08) State form in the CalSAWS system and update the Batch trigger when reading the Correction Request Activity file. State form TEMP NA 1238 (7/04) will also be updated to include the CF Account Adjustment Advice.

1.1 Current Design

Currently, when a participant wants to dispute an EBT cash transaction, such as not receiving the correct amount of cash from an ATM or POS machine, being charged too much when accessing cash benefits, or claims that he/she did not perform a transaction with their EBT card (electronic theft), they may file a claim. When the EBT vendor denies the claim, the EBT vendor sends the county the denial information, and the county sends out the denial form, which is the M16-701. This form's generation is currently suppressed by CA-248929 'CalSAWS generates M16-701 NOA in error' (release 22.07).

For CalFresh, currently the system only generates a denial for the Adjustment Request.

SCR CA-246323 added M16-705 form to the Template Repository in English, Spanish, Chinese, Russian, and Vietnamese.

1.2 Requests

1. The M16-705 form needs to generate when the EBT vendor denies an EBT cash adjustment claim for receiving the incorrect amount of cash from an ATM or POS machine, and/or being charged too much when accessing cash benefits (Adjustment Status = 09).
2. The TEMP NA 1238 form needs to be updated to also contain the CF Account Adjustment Advice.

1.3 Overview of Recommendations

1. Generate M16-705 when the Cash claim is denied for receiving the incorrect amount of cash from an ATM or POS machine, and/or being charged too much when accessing cash benefits. Trigger form M16-705 through Fiscal Batch when Correction Request Activity file has Adjustment Status = 09, position 226-227, Account Type = 02 (for Cash) position 224-225, and Correction Request Reason Code = MISDIS at position 320-325.
   Note: Currently form M16-701 - EBT Adjustment Advice has been erroneously generated for Adjustment Status = 09. Form M16-701 should only trigger when Adjustment Status = 01.
2. Update the TEMP NA 1238 (7/04) State form to include the CF Account Adjustment Advice in the CalSAWS system. Trigger and generate form TEMP NA 1238 for CalFresh Account Adjustment Advice when Account Type = 01 (for CalFresh), position 224-225 and Adjustment Status = 01 (for Adjustment), position 226-227.

Note: There are 2 parts in the form TEMP NA 1238: CF Account Adjustment Advice (Adjustment = 01) and CF Request Denial (Adjustment Status = 09) but currently it only generates the Request Denial.

1.4 Assumptions

1. When generated in the context of a case, all fields will be editable for all counties, as per CalSAWS standards.
2. The rest of the threshold languages for M16-705 will be added by CA-247547 when the State makes them available:
Armenian, Arabic, Cambodian, Farsi, Hmong, Korean, Lao, and Tagalog.
3. Per existing functionality, a GEN 1365 is included in the same envelope with the English version of the M16-705 form when Printing Centrally and the participant's primary language is a language other than the currently supported languages for this form.
4. Form TEMP NA 1232 will not be updated with this effort.
5. Per current functionality implemented in CA-207246, an Automated Journal entry is created in the CalSAWS system for all forms.
6. SCR CA-259733 will update the ~~M16-705 and~~ TEMP NA 1238 to the latest State Version.

2   RECOMMENDATIONS

2.1   Update Form M16-705 - EBT Adjustment Denial

2.1.1   Overview

This SCR will add Batch generation to the State form M16-705 - EBT Adjustment Denial (revision 06/23) in the CalSAWS system. The form is also updated to match the latest state version as provided by CDSS.

State Form: M16-705 (06/23)
Current Programs: CalWORKs
> **Note:** More programs will be added per 2.1.4.2.
Current Attached Form(s): NA Back 9
Current Forms Category: NOA
Current Template Repository Visibility: All Counties
Existing Languages: English, Spanish, Chinese, Russian, Vietnamese

2.1.2   Form/NOA Verbiage

Updates to XDP
The XDP for the M16-705 will be updated with the following verbiage updates:

Location	Old Verbiage	New Verbiage
First page – first sentence	The county has denied your request to have $<Adjustment Amount> credited to your EBT Cash Aid.	Your request to have $<Adjustment Amount> added to your Electronic Benefit Transfer (EBT) Cash Aid was denied.

Updated Languages: English and Spanish

2.1.3   Form/NOA Variable Population

The dollar amount variable will be prepopulated as the form is generated via Batch. The input field under 'Here's why' will be populated for all generation conditions with a default value. See Supporting Documents #2 for translations for this sentence.
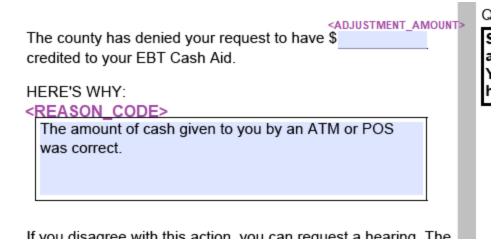
Figure 2.1.3.1

Note: Figure 2.1.3.1 shows the old verbiage for the first sentence. This sentence is changed (please see section 2.1.2) however, the variable displayed is kept the same.

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Batch Population
<ADJUSTMENT_ AMOUNT>	Adjustment Amount from the Correction Request Activity file at position 230-236 EBT_CORRECT_ACTIV.ADJUST_AMT	Arial Font Size 10 Format: XX,XXX.XX	Y, Text Field	N	Y
<REASON_CODE>	"The amount of cash given to you by an ATM or POS was correct."	Arial Font Size 10 Format: Static text	Y, Text Field	Y	Y

* Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

Variables Requiring Translations: N/A

The population of the variables will be taken from the required form input **EBT Correct Active ID** when it is triggered through the fiscal batch.

2.1.4 Form/NOA Generation Conditions

1. **Add Batch Form Generation**

Generate and save form M16-705 through fiscal Batch when Correction Request Activity file has Adjustment Status = 09 at position 226-227, Account Type = 02 (for Cash) at position 224-225, and Correction Request Reason Code = MISDIS at position 320-325.

Per current functionality, the Correction Request Reader batch job does not look at program and will generate form M16-705 whenever there is a claim denial for cash.

Note: MISDIS = ATM/POS Misdispense.

Tech Note: since form is available in threshold languages, CT942_XXX will need to reflect that.

New Counties Batch Generation: See Supporting Documents #4, 'Yes' column

2. **Update Form in Template Repository**

New Program Generation: Cal-Learn, CalWORKs, CAPI, General Assistance/General Relief, General Assistance (Managed), GA/GR Automated Solution, Refugee Cash Assistance, REP, Welfare to Work

3. **Turn Off Threshold Languages**

Turn off the following threshold languages: Chinese, Russian, and Vietnamese

2.2 Update Form M16-701 - EBT Adjustment Advice

2.2.1 Overview

This form is used to notify the participant that their EBT account will be adjusted to account for a system error. It was suppressed as part of a stored procedure with SCR CA-248929.

State Form: M16-701 (08/08)
Current Programs: CalWORKs (CW), Refugee Cash Assistance (RCA), Cash Assistance Program for Immigrants (CAPI), General Assistance (GA)
Current Attached Form(s): NA Back 9
Current Forms Category: NOA
Current Template Repository Visibility: All Counties
Existing Languages: English, Spanish, Chinese, Russian, Vietnamese

2.2.2 Form/NOA Verbiage

There are no changes to the NOA verbiage.

2.2.3 Form/NOA Variable Population

There are no changes to the NOA variable population.

2.2.4 Form/NOA Generation Conditions

1. **Add Batch Form Generation**

   Update existing trigger for M16-701 to generate and save form M16-701 when Adjustment Status = 01 at position 226-227. The rest of the triggers will remain the same: Account Type = 02 (for Cash) position 224-225, and Correction Request Reason Code = MISDIS at position 320-325.

   Technical Note: PI19F413

   Remove stored procedure suppressing the M16-701 that was added with SCR CA-248929.

2.3 Update Form TEMP NA 1238 - EBT CalFresh Account Adjustment – Denial

2.3.1 Overview

This SCR will update the TEMP NA 1238 (7/04) State form to include the CF Account Adjustment Advice in the CalSAWS system.

State Form: TEMP NA 1238 (7/04)

Current Programs: CalFresh

Current Attached Forms: NA Back 9

Current Forms Category: NOA

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish

2.3.2 Form/NOA Verbiage

Update Form XDP

This SCR will bring significant updates to the verbiage by adding the CF Account Adjustment Advice verbiage on the right-hand side, under State Hearing and Questions sections (see Supporting Documents #3). The left-hand side will also have a subtitle added to differentiate between the 2 parts. This effort will also update the TEMP NA 1238 form to use standard Arial font size 10 for both English and Spanish versions.

Note: this update to include right-hand side verbiage will be reflected both in Template Repository and via Batch.

Updated Languages: English, Spanish

Form Title (Document List Page Displayed Name): CalFresh Notice of Action EBT Account Adjustment

Update Imaging Form Title: CF NOA EBT Account Adjustment

Form Mockups/Examples: See Supporting Documents #3 for PDF Mockups.

This effort does not bring any updates to the form header or NA Back 9.

2.3.3 Form/NOA Variable Population

The following variables will be prepopulated when the form is generated:

ACCOUNT ADJUSTED (By Retailer)

<ADJ_CHECKBOX>

☐   On <ADJ_DATE_RMV>   , your electronic CalFresh benefit account will have $ <ADJ_RMV_AMT> removed from your balance.

HERE'S WHY:

A system error happened when using your electronic CalFresh benefit account:

Date: <ADJ_DATE>

Time: <ADJ_TIME>

Location: <ADJ_LOC>

             <ADJ_ADDR>

             <ADJ_CITY>   <ADJ_STATE> <ADJ_ZIP>

Amount: $ <ADJ_RMV_AMT>

Other:

IMPORTANT

Figure 2.2.3.1

Form Body Variables:

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Batch Population
<ADJ_CHECKBOX>	Checkbox that will indicate the selection of 'ACCOUNT ADJUSTED' side. Implement logic to differentiate between adjustment and denial.	Arial Font Size 10	Y	N	Y

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Batch Population
	Checked only if EBT_CORRECT_ACTIV.ADJUST_STAT_CODE=01				
<ADJ_DATE_RMV>	The date the EBT account will have a specific amount removed from balance. EBT_CORRECT_ACTIV.REQ_DATE	Arial Font Size 10	Y	N	Y
<ADJ_RMV_AMT>	Amount that will be removed from EBT account. EBT_CORRECT_ACTIV.ADJUST_AMT	Arial Font Size 10 Format: XX,XXX.XX	Y	N	Y
<ADJ_DATE>	Date that error occurred when using the EBT card. EBT_CORRECT_ACTIV.TRANSACT_DATE	Arial Font Size 10 Format: MM/DD/YYYY	Y	N	Y
<ADJ_TIME>	Time that error occurred when using the EBT card. EBT_CORRECT_ACTIV.TRANSACT_DATE	Arial Font Size 10 Format: HH24:MI AM	Y	N	Y
<ADJ_LOC>	The retailer's name where the error occurred using the EBT card. EBT_CORRECT_ACTIV.PROC_NAME	Arial Font Size 10	Y	N	Y
<ADJ_ADDR>	The retailer's street address (Address Line 1) where the error occurred using the EBT card. EBT_CORRECT_ACTIV.PROC_LINE_1_ADDR	Arial Font Size 10	Y	N	Y
<ADJ_CITY>	City of retailer's address. EBT_CORRECT_ACTIV.PROC_CITY	Arial Font Size 10	Y	N	Y

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Batch Population
<ADJ_STATE>	State of retailer's address. EBT_CORRECT_ACTIV.PROC_STATE	Arial Font Size 10 Format: XX	Y	N	Y
<ADJ_ZIP>	Zip code of retailer's address. EBT_CORRECT_ACTIV.PROC_ZIP_CODE_NUM	Arial Font Size 10 Format: XXXXXXXX	Y	N	Y

* Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

The population of the variables will be taken from the required form input **EBT Correct Active ID** when it is triggered through the fiscal batch.

2.3.4 Form/NOA Generation Conditions

Updates to Batch Form Generation

Currently the TEMP NA 1238 form generates only for the CF Request Denial (Adjustment Status = 09). Update Batch trigger to also generate the TEMP NA 1238 form for the CF Account Adjustment Advice (Adjustment Status = 01) and populate the right-hand side of the form when doing so.

The Required Form Input when generated by Batch will remain 'EBT Correct Active ID'. This is required only when generated from system. It will not be available in the Template Repository.

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

2.4 Fiscal: Interface Partner Testing

2.4.1 Overview

Interface Partner Testing with FIS for inbound EBT Correction Activity File.

2.4.2 Description of Changes

1. Perform Interface Partner Testing with FIS for Los Angeles, Kern, Merced and Placer for EBT Correction Activity File.

2.4.3 Counties Impacted

Los Angeles, Del Norte, Humboldt, Kern, Kings, Lake, Lassen, Madera, Marin, Mendocino, Merced, Modoc, Monterey, Orange, Placer, Plumas, Riverside, Sacramento, San Benito, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Siskiyou, Sonoma, Stanislaus, Sutter, Tehama, Trinity, Tuolumne

2.5 Fiscal: Update Correction Request Reader Batch Job (PIXXF413)

2.5.1 Overview

This request it to create new batch jobs and properties for all opt'd in counties to the EBT Correction Request Reader Batch Job. This request will also update EBT Correction Request Reader Batch Job for LA County.

2.5.2 Description of Change

1. Update the Correction Request Reader batch (PIxxF413) to generate and save form M16-705 when the Correction Request Activity file is for Cash Denials.
   a. Triggers:
      i. Adjustment Status = 09 at position 226-227.
      ii. Account Type = 02 (for Cash) at position 224-225.
      iii. Correction Request Reason Code = MISDIS at position 320-325.
   b. Note: Per current functionality, the Correction Request Reader batch job does not look at program and will generate form M16-705 whenever there is a claim denial for cash.
2. Update the Correction Request Reader Batch (PIxxF413)'s existing trigger for M16-701 to generate and save form M16-701 when Correction Request Activity file is for Cash Adjustments.
   a. Adjustment Status = 01 at position 226-227.
   b. The rest of the triggers will remain the same:
      i. Account Type = 02 (for Cash) position 224-225,
      ii. Correction Request Reason Code = MISDIS at position 320-325.
3. Update the Correction Request Reader batch (PIxxF413) to also generate the TEMP NA 1238 form for CalFresh Adjustments.
   a. Note: Currently the TEMP NA 1238 form generates only for CalFresh Denials (Adjustment Status = 09).
4. Create new Batch Job numbers for counties opted into the EBT Correction Request Reader Batch Job.
   a. Opted In: Del Norte, Humboldt, Kern, Kings, Lake, Lassen, Madera, Marin, Mendocino, Merced, Modoc, Monterey, Orange, Placer, Plumas, Riverside, Sacramento, San Benito, San

Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Siskiyou, Sonoma, Stanislaus, Sutter, Tehama, Trinity, Tuolumne

5. Create new Batch properties for counties Opted into the EBT Correction Request Reader Batch Job based off LA County's (PI19F413).

   a. Opted In: Del Norte, Humboldt, Kern, Kings, Lake, Lassen, Madera, Marin, Mendocino, Merced, Modoc, Monterey, Orange, Placer, Plumas, Riverside, Sacramento, San Benito, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Siskiyou, Sonoma, Stanislaus, Sutter, Tehama, Trinity, Tuolumne

2.5.3 Execution Frequency

Daily.

2.5.4 Key Scheduling Dependencies

N/A.

2.5.5 Counties Impacted

Opted In: Del Norte, Humboldt, Kern, Kings, Lake, Lassen, Madera, Marin, Mendocino, Merced, Modoc, Monterey, Orange, Placer, Plumas, Riverside, Sacramento, San Benito, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Shasta, Siskiyou, Sonoma, Stanislaus, Sutter, Tehama, Trinity, Tuolumne

2.5.6 Data Volume/Performance

N/A.

2.5.7 Failure Procedure/Operational Instructions

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

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	M16-705 mockup (English)	M16-705_EN.pdf
2.	Correspondence	M16-705 'Here's Why' default value translations	M16-705 sentence translations.xlsx
3.	Correspondence	TEMP NA 1238 (English, Spanish)	TEMP_NA1238_EN.pdf TEMP_NA1238_SP.pdf
4.	Correspondence	List of Counties opted in for M16-705 Batch generation	CRFI 23-025 Option for M16-705 EBT Adjustment Denial_MASTER.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	The CalSAWS 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; 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 CalSAWS-generated access information; and v. CSC PIN notices.	With SCR CA-56518, form M16-705 will have batch generation added to the CalSAWS system. The existing form TEMP NA 1238 will be updated.

5 APPENDIX

Forms to generate for correction requests:

Account Type Adjustment Status	01 (CalFresh)	02 (Cash)
01 (New debit correction request)	TEMP NA 1238 (Advice version)	M16-701
09 (Denied credit correction request)	TEMP NA 1238 (Denial version)	M16-705

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-234382

Remove ( ) and / from CalSAWS form numbers

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Mohammad Dabbagh, Phong Xiong
	Reviewed By	Rajesh Rudra, Gillian Noelle Bendicio

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/21/2023	1.0	Initial Draft – Content Revision	Mohammad Dabbagh, Phong Xiong
11/1/2023	1.1	Content Revision to add CW-CF RE Packet	Gillian Noelle Bendicio

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1   OVERVIEW

This effort is to clean up the form numbers in the system to no longer use any parentheses and slashes as part of the form numbers.

1.1   Current Design

Currently several forms have / and () in the form number. This creates error when the documents are imaged and run through OCR.

1.2   Requests

1. Remove any / and () from all form numbers.
2. Modify code files that are impacted by the removal of / and () from the form numbers.

1.3   Overview of Recommendations

1. Run a DCR to the DOC_TEMPL table to remove the / and () from the TEMPL_NUM_IDENTIF column.
2. Update the Self-Service Portal Form Status Batch Jobs to use the updated form numbers.
3. Update the Code logic to use the updated form numbers.

1.4   Assumptions

1. The form numbers will not be updated in the PDFs.
2. Any forms with "Legacy" in the name will not be modified, as they are no longer in use by the system.
3. Any historical record of forms in the spreadsheet will reflect these changes and any new record moving forward.

2   RECOMMENDATIONS

2.1   Run a DCR to DOC_TEMPL Table Recommendation

2.1.1   Overview

The DOC_TEMPL table stores records for all the forms that exist in the system. This includes the form numbers. There are some form numbers that includes () and /, which will need to be removed as to not cause issues with imaging.

2.1.2   Description of Changes

Run a DCR to the DOC_TEMPL table to remove the / and () from the TEMPL_NUM_IDENTIF column

Please see supporting document #1 for the list of forms affected.

2.2   Update BC Form Sender Writer batch job to use updated form numbers

2.2.1   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.

2.2.2   Description of Change

1. Modify the batch job to replace 'SAR 7 Addendum/SAR 2/SAR 7' in sending the SAR 7 information to use 'SAR 7 Addendum-SAR 2-SAR 7'.
2. Modify the batch job to replace 'CW/CF/MC Packet' in sending the CW/CF/MC RE information to use 'CW-CF-MC Packet'.
3. Modify the batch job to replace 'CW/MC Packet' in sending the CW/MC RE information to use 'CW-MC Packet'.
4. Modify the batch job to replace 'CW/CF RE Packet' in sending the CW/CF RE information to use 'CW-CF RE Packet'.

2.2.3   Execution Frequency

No Change. Daily (Mon-Fri).

2.2.4   Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

CalSAWS Counties.

2.2.6 Data Volume/Performance

N/A

2.2.7 Interface Partner

BenefitsCal Portal

2.2.8 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.)

2.3 Update Form Status batch job to remove end-dated packets to use updated form numbers

2.3.1 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.

2.3.2 Description of Change

1. Modify the batch job to replace 'SAR 7 Addendum/SAR 2/SAR 7' in sending the SAR 7 information to use 'SAR 7 Addendum-SAR 2-SAR 7'.
2. Modify the batch job to replace 'CW/CF/MC Packet' in sending the CW/CF/MC RE information to use 'CW-CF-MC Packet'.
3. Modify the batch job to replace 'CW/MC Packet' in sending the CW/MC RE information to use 'CW-MC Packet'.
4. Modify the batch job to replace 'CW/CF RE Packet' in sending the CW/CF RE information to use 'CW-CF RE Packet'.

2.3.3 Execution Frequency

No Change. Daily (Mon-Fri).

2.3.4 Key Scheduling Dependencies

No Change.

2.3.5 Counties Impacted

CalSAWS Counties.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

BenefitsCal Portal

2.3.8 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.)

2.4 Update the Code logic to use the updated form numbers

2.4.1 Overview

The Code logic is using the value of two forms as a hard coded value, these form numbers need to be updated to reflect the new form numbers in DOC_TEMPL table.

2.4.2 Description of Changes

1. Modify the SQL queries in file YbnFormDaoImpl.java to reflect the new form number for the packet from using CW/CF RE Packet to using CW-CF RE Packet.
2. Modify the SQL queries in file YbnFormDaoImpl.java to reflect the new form number for the packet from using SAR 7 Addendum/SAR 2/SAR 7 to using SAR 7 Addendum-SAR 2-SAR 7.
3. Modify the HashMap instantiation in file Utilities.java to reflect the new form number for the packet from using CW/CF RE Packet to using CW-CF RE Packet.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	List of forms and their form numbers updated.	CA-234382 List of forms to be updated.xlsx

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.15 CAR-1251	The LRS shall keep a copy of all historical notices, NOAs, forms, letters, stuffers, and flyers generated, for COUNTY-specified Users to view whenever necessary in both English and the threshold language, if utilized.	Updating the form numbers in the DOC_TEMPL table.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-241306

Add Missing Translations for CF 377.7D

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Deepika Gajendra Babu
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/07/2023	1.0	Initial Draft	Deepika G
09/26/2023	1.1	Content Revision – Updated Request and recommendation to update existing English and Spanish languages to match the state version	Lianel Richwin

Table of Contents

1 OVERVIEW

This effort will update and add available threshold languages to CF 377.7D in CalSAWS.

1.1 Current Design

Currently, CF 377.7D (1/14) is only available in English and Spanish Languages in CalSAWS.

1.2 Requests

Update and add CF 377.7D (1/14) – "CalFresh Overissuance Notice for Administrative Errors (AE) Only" in English and available threshold languages to CalSAWS Template Repository.

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

1.3 Overview of Recommendations

Update and add CF 377.7D (1/14) – "CalFresh Overissuance Notice for Administrative Errors (AE) Only" in English and available threshold languages to CalSAWS Template Repository.

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

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English and Spanish forms.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Update and Add Available Threshold Languages of CF 377.7D to CalSAWS.

2.1.1   Overview

This section will cover the requirements for updating and adding the CF 377.7D forms in available threshold languages.

State Form: CF 377.7D (1/14)

Current Programs: CalFresh

Current Forms Category: NOA

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

Template Description: This form is sent to the participant to notify them that there were too many CalFresh benefits issued due to an error. It provides the participant with the error reason and the calculations of the error.

Imaging Form Name: CF OI Notice for AE Only

Imaging Document Type: Overpayment/Overissuance (OP/OI)

2.1.2   Form Verbiage

Create CF 377.7D XDP's for Threshold Languages

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

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

Form Mockups/Examples: See Supporting Documents #1
Form Header: CalSAWS Standard Header #1
Form Number: CF 377.7D
Include NA BACK 9: Yes

2.1.3   Form Variable Population

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

2.1.4 Form Generation Conditions

CF 377.7D is available from Template Repository.

Form Print/Mailing Options
Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

Print Options:

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

Mailing Options:

Mailing Options	Option for CF 377.7D Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for CF 377.7D Form
Post to Self-Service Portal	Y

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CF 377.7D Threshold Languages	CF3777D_EN.pdf CF3777D_SP.pdf CF3777D _AR.pdf CF3777D _AE.pdf CF3777D _CA.pdf CF3777D _CH.pdf CF3777D _FA.pdf CF3777D _HM.pdf CF3777D _KO.pdf CF3777D _LA.pdf CF3777D _RU.pdf CF3777D _TG.pdf CF3777D _VI.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 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; 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.	CF 377.7D is being added in available threshold Languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251155

Add NOA Fragments in Threshold Languages for CalWORKs NOA Generation (M40-107B)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Singaram Manickam
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/21/2023	1.0	Initial Document	Singaram Manickam
10/28/2023	1.1	==Updated recommendation to include English and Spanish languages==	Singaram Manickam

Table of Contents

1   OVERVIEW

The purpose of this change is to <mark>update English, Spanish</mark> and add NOA Fragments in Threshold Languages for CalWORKs NOA Generation (M40-107B).

1.1   Current Design

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

1.2   Requests

<mark>Update English, Spanish</mark> and add Threshold languages to Time on Aid at Application/ Redetermination with NOA code A416I (Snippet ID - 9582).

Languages Include: <mark>English, Spanish</mark>, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese

1.3   Overview of Recommendations

<mark>Update English, Spanish</mark> and add Threshold languages to Time on Aid at Application/ Redetermination with NOA code A416I (Snippet ID - 9582).

Languages Include: <mark>English, Spanish</mark>, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese

1.4   Assumptions

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

2 RECOMMENDATIONS

2.1 Update and add Threshold languages to Time on Aid at Application/ Redetermination with reason code A416I.

2.1.1 Overview

Update English, Spanish and add Threshold languages to Time on Aid at Application/ Redetermination with NOA code A416I.

Reason Fragment Name and ID:
CW_IN_TL_60_REDETERM_EXEMPTS_AND_CS_A416
(Fragment ID: 9582)
State Form/NOA: NA 530/M40-107B
Current NOA Template: CW_TL_60_NOA_TEMPLATE (ID: 3044)
Current Program(s): CalWORKs
Current Action Type: Informational
Include NA Back 9: Yes
Existing Languages: English & Spanish

2.1.2 Form/NOA Verbiage

Update English, Spanish and add M40-107B NOA fragments in Threshold languages.

Updated Languages: English and Spanish

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

	Current Verbiage	Updated Verbiage
English	On the date of the last time limit notice, _____, the County determined that you, _____ used a total of _____ months of your lifetime 60-month time limit of CalWORKs cash aid. Since ____, you used _____ more months. Here's why: Since your last time limit notice, you got CalWORKs:	On the date of the last time limit notice, _____, the County determined that you, used a total of _____ months of your lifetime 60-month time limit of CalWORKs cash aid. Since ____, you used _____ more months. Here's why: Since your last time limit notice, you got CalWORKs:

_____ Subtotal = _____ month(s). Month(s) that did not count. -_____ month(s). The additional months used: + _____ The total number used is now = _____ month(s). If you were exempt, the month(s) did not count toward the CalWORKs 60-month time limit. These months are listed on the next page.	_____ Subtotal = _____ month(s). Month(s) that did not count. -_____ month(s). The additional months used: + _____ months(s). The total number used is now = _____ month(s). If you were exempt, the month(s) did not count toward the CalWORKs 60-month time limit. These months are listed on the next page.

NOA Mockups/Examples: Supporting Documents #1

2.1.3 Form/NOA Variable Population

No updates to variable population.

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	M40-107B NOA fragments	Fragments_Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:	M40-107B NOA Reason fragment is being updated and

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

CalSAWS

Design Document

CA-251170

Add NOA Fragments in Threshold Languages for CalWORKs NOA Generation (M40-107F)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Singaram Manickam
	Reviewed By	Lianel Richwin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/07/2023	1.0	Initial Document	Singaram Manickam
10/28/2023	1.1	Updated recommendation to remove Russian language for Snippet ID - 9581.	Singaram Manickam

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1   OVERVIEW

The purpose of this change is to add NOA Fragments in Threshold Languages for CalWORKs NOA Generation (M40-107F).

1.1   Current Design

M40-107F (4/21) - Extended Beyond 60 Months of Aid NOA fragments available in English and Spanish.

1.2   Requests

1. Add Threshold languages to M40-107F with NOA code A415I (Snippet ID - 9581).

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

2. Add Threshold languages to NOA Type (Snippet ID - 3175)
   Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese

1.3   Overview of Recommendations

1. Add Threshold languages to M40-107F NOA with reason code A415I (Snippet ID - 9581).

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

2. Add Threshold languages to NOA Type (Snippet ID - 3175)

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

1.4   Assumptions

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

2   RECOMMENDATIONS

2.1   Add Threshold languages to M40-107F with reason code M092A.

2.1.1   Overview

Add Threshold languages to M40-107F with NOA code A415I.

Reason Fragment Name and ID:
CW_IN_TL_60_EXTENDED_EXEMPTS_CS_A415
(Fragment ID: 9581)
State Form/NOA: NA 530/M40-107F
Current NOA Template: CW_TL_60_NOA_TEMPLATE (ID: 3044)
Current Program(s): CalWORKs
Current Action Type: Immediate Need
Include NA Back 9: Yes
Existing Languages: English & Spanish

2.1.2   Form/NOA Verbiage

Add M40-107F NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.1.3   Form/NOA Variable Population

No updates to variable population.

2.1.4   Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2   Add Threshold languages to NOA Type.

2.2.1   Overview

Add Threshold languages to CW_NC_TL_60_NOA_TYPE Fragment.

Reason Fragment Name and ID: CW_NC_TL_60_NOA_TYPE
(Fragment ID: 3175)
Current Program(s): CalWORKs

Current Action Type: No Change
Existing Languages: English, Spanish

2.2.2 Form/NOA Verbiage

Add NOA fragments in Threshold languages.

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

NOA Mockups/Examples: Supporting Documents #1

2.2.3 Form/NOA Variable Population

No updates to variable population.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Correspondence	M40-107F NOA fragments	Fragments_Verbiage.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 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;	M40-107F NOA Reason fragments are being added in available Threshold languages.

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251329

Elimination of Asset Limits for Non-Modified Adjusted Gross Income Medi-Cal Programs

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/17/2023	.01	Draft Design	Cynthia Ridley
07/27/2023	.02	Added Correspondence Recommendations	Sahithi Pabba
08/07/2023	.03	Reviewed with Build/Test	Cynthia Ridley
08/09/2023	.04	Reviewed with Consortium Analysts and DHCS. • Updated CT_170 reference to remove residency, this is still required verification. • Added a note under Recommendation 2.1.2.4 to reference programs for 'Medi-Cal Property' test. • Added Assumption that the AVP batch will not be turned off with this SCR. It is still needed for a time to determine Period of Ineligibility POI (30 month Look Back) for Long-Term Care.	Cynthia Ridley
08/14/2023	1.0	Submitted for review with Consortium Analysts	Cynthia Ridley
08/24/2023	1.1	Updated Design based on Analyst feedback. • Removed Assumption regarding Medi-Cal Property Sneede • Updated Assumption regarding forms to remove the word Renewal • Added Waiver to Recommendation 2.1.2.4	Cynthia Ridley
08/24/2023	1.2	Updated Design based on Analyst feedback. • Removed Assumption regarding MAGI NOA's related to property/asset limit • Removed Recommendation 5 and added assumption 11 regarding threshold languages with the future SCR number. • Added assumption 12 regarding	Sahithi Pabba

		verbiage update for reason fragments MC_TN_FAIL_REDETER_RESPONSE_M400 Id: 6897, Q_TN_FAIL_REDETER_RESPONSE_Q400 Id: 6320	
08/24/2023	2.0	Submitted for Committee Review	Cynthia Ridley
9/27/2023	2.1	Removed obsoleted NOA Fragments from effort	Tiffany Huckaby
10/12/2023	2.2	Content Clarifications added for Code Table entries	Cynthia Ridley
10/24/2023	2.3	Content Revision to effective end date the fragments	Nithya Chereddy

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1 OVERVIEW

In 2021, AB 133 of the Health Omnibus Bill of 2021-2022 added section 14005.62 to the Welfare and Institute Code (WIC) 14005.62 establishing a two-phased approach to eliminate the asset limits for Non-MAGI Medi-Cal programs. Phase 1, was implemented with CA-230196 Increases to the Asset Limits for Non-MAGI Medi-Cal Programs in 22.05, increased the Asset Limits effective July 1, 2022, to $130,000 per person and $65,000 for each individual household member (up to a maximum of 10 people). CalSAWS refers to Asset as Property and determines Non-MAGI Medi-Cal eligibility using the Asset limits stated in ACWDL 21-31.

The purpose of this SCR is to satisfy Phase II changes to Non-MAGI Medi-Cal programs to align with the direction provided by DHCS outlined in ACWDL 22-25. The ACWDL provides guidance to eliminate the Asset limits for Non-MAGI Medi-Cal programs effective January 1, 2024.

1.1 Current Design

CalSAWS Medi-Cal EDBC rules calculate the Property Total and Countable Amount for all Non-MAGI Medi-Cal programs. EDBC rules then uses the Countable Amount and compares it to the Property Limit for Non-MAGI Medi-Cal programs, including Long Term Care (LTC) and Medicare Savings Programs (MSP) to determine Non-MAGI Medi-Cal eligibility.

Medi-Cal EDBC uses the following property limits (CT351) for a Non-MAGI Medi-Cal determination, including LTC.

- One individual, property limit of $130,000
- Two Individuals, property limit of $195,000
- The property limit increases by $65,000 for each additional household up to a maximum of 10 household members.

Medi-Cal EDBC uses the following property limits (CT335) for MSP Qualified Medicare Beneficiary (QMB), Specified Low-Income Medi-care Beneficiary (SLMB) and Qualifying Individual (QI -1)

- $130,000
- $195,000 for married couple

1.2 Requests

Per ACWDL 22-25, effective 01/01/2024, CalSAWS will eliminate using the Property limit test in Non-MAGI Medi-Cal programs, including LTC and MSP, to no longer be countable in the Asset Test for Non-MAGI Medi-Cal.

1.3 Overview of Recommendations

1. Update the Medi-Cal EDBC Rules to no longer display or count property in the eligibility determination for Non-MAGI Medi-Cal, including LTC, and Medicare Savings Programs effective January 2024 Benefit month or later.
2. Obsolete the Non-MAGI Reason fragments related to Asset and Property Limits.
3. Update the Verbiage of existing Non-MAGI Reason Fragments to not have text relating to Property.

1.4 Assumptions

1. The Non-MAGI Medi-Cal Denial and Discontinuance NOAs (that has the property limit variable) will retrieve the appropriate unit size property limit from the category code table and display the updated property limit automatically for Denial and Discontinuances prior to January 1, 2024.
2. The following forms are rendered obsolete as of January 1, 2024, but will remain in the Template Repository for use in Retroactive Medi-Cal Determinations:
   a. • Medi-Cal General Property Limitations (MC 007)
      • Sneede v. Kizer Property Worksheet (MC 175-3 P)
      • Medi-Cal Property Assessment Application (MC 176 PA-A)
      • QMB/SLMB/QI Property Worksheet, Adult (MC 176 P-A QMB/SLMB/QI)
      • QMB/SLMB/QI Property Worksheet, Child (MC 176 P-C QMB/SLMB/QI)
      • Period of Ineligibility for Nursing Facility Level of Care Worksheet (MC 176 P-I)
      • QDWI Property Worksheet (MC 176 QDWI-2)
      • Supplement to Statement of Facts—Pickle Eligibility Determination (MC 210 B)
      • Property Assessment Statement of Facts (MC 210 PA)
      • Medi-Cal Potential Overpayment Reporting Worksheet—Property Total Ineligibility or Ineligibility for a Specific Level of Services (MC 224 B)
      • Tuberculosis Program Property Worksheet-Adult (MC 278 TB)
      • Pickle Resource Worksheet (DHCS 7037)
3. Renewal Packets removing any property information have been updated with CA-252364
4. Renewal Forms MC 008, MC 010, MC 7077/DHCS 7077, and MC 14 A that update Asset Limits effective July 1, 2022 will be updated with CA-247694.
5. The below forms that will remove any reference to property will be updated in future SCRs as DHCS provides CalSAWS with updated versions:
   • Qualified Medicare Beneficiary Program Information Notice (MC 008)
   • Qualified Disabled Working Individual Information Notice (MC 010)
   • QMB, SLMB, QI Application (MC 14 A)
   • Property Worksheet/Assessment for Institutionalized Spouses (MC 176 PA-1)
   • Stepparent Computation When Only the Separate Children of One Spouse Want Medi-Cal (MC 176 W-1)
   • MC 210 A (Supplement to Statement of Facts for Retroactive Coverage/Restoration (MC 210 A)
   • What You Need to Know When You Apply for an Enroll in Medi-Cal (MC 219)

- Medi-Cal Request for Information (MC 355)
- Notification of Medi-Cal Intercounty Transfer (MC 360)
- Request for Limited Services (MC 4026)
- Notice Regarding Standards for Medi-Cal Eligibility (MC 7077)

6. The CMSP program does not have property limit changes therefore it will not be included with this SCR.

7. Cases where EDBC is run for a benefit month prior to January 1, 2024 will continue to use the increased Property Limits, therefore the Property Limits Code Table will not be updated with this SCR.

8. Asset Verification Program (AVP) will still need to be utilized for a time after the implementation of this design, therefore the AVP batch will not be turned off with this SCR.

9. The applicable NOAs will be regression tested by Client Correspondence, in checking for the updated property limit values.

10. The CMSP Reason Fragment's relating to Property and Asset will not be updated/obsoleted by this effect.

11. The reason fragments verbiage update will only be updated in English and Spanish languages with this effort. Threshold language verbiage update will be done with the future SCR CA-266848.

2 RECOMMENDATIONS

2.1 Medi-Cal Eligibility Rules Updates

2.1.1 Overview

Update the Medi-Cal EDBC Rules to no longer display or count property in the eligibility determination for Non-MAGI Medi-Cal, including LTC, and Medicare Savings Programs effective January 2024 Benefit month or later.

2.1.2 Description of Changes

1. Update Medi-Cal EDBC Rules to always pass the Medi-Cal property budget effective EDBC Benefit month January 1, 2024, or later except when testing for 'CMSP'.

   Note: The 'CMSP Property' and 'CMSP Property Sneede' will remain unchanged.

2. Update Medi-Cal EDBC Rules to no longer fail an individual for having a 'Pending', or 'Refused' property verification effective January 2024 Benefit Month or later.

3. Update the Verification Type Code (CT_170) Medi-Cal Reference table (8) below from Mandatory to Not Needed as follows:
   a. Effective 12/31/2023, end date the current Mandatory Verifications (REFER_TABLE_8_DESCR) records below.

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b. Effective 01/01/2024, insert new record for Mandatory Verifications (REFER_TABLE_8_DESCR) below with value of 'N'.

CODE_NUM _IDENTIF	SHORT DECODE	UPDATED VALUE (REFER_TABLE_8_DESCR)
21	Liquid Property	N
23	Motor Vehicle	N
24	Personal Property	N
33	Real Property	N
39	Transferred Property	N

4. Update the Medi-Cal Test Category Code (CT_318) Property Reference Table (2) to no longer display in Medi-Cal EDBC Summary as follows.
   a. Effective 12/31/2023, end date the current Property Reference Table (REFER_TABLE_2_DESCR) records below.
   b. Effective 01/01/2024, insert a new record for Property Reference Table (REFER_TABLE_2_DESCR) below with value of 'N'.

CODE_NUM_IDENTIF	SHORT DECODE	UPDATED VALUE (REFER_TABLE_2_DESCR)
01	Waiver	N
02	Minor Consent	N
03	LTC	N
04	Pickle	N
05	Pickle Spouse	N
07	1931(b) Property	N
08	1931(b) Property Sneede	N
16	Medi-Cal Property	N
17	MC Property Sneede	N
28	Working Disabled	N
35	Tuberculosis	N
37	QWDI	N
38	MSP-MC	N
39	MSP-SSI	N

Note: 'Medi-Cal Property' includes the following programs: Aged/Blind/Disabled, Aid to Families with Dependent Children (AFDC), Medically Needy, Medically Indigent, Under 21, and Aged & Disabled.

2.1.3 Programs Impacted

Medi-Cal, LTC, Medicare Savings Programs

2.1.4 Performance Impacts

N/A

2.2 Obsolete the Existing Non-MAGI Reason Fragments Relating to Property and Asset Limits.

2.2.1 Overview

Obsolete the Existing Non-MAGI Reason Fragments effective Dec 31st 2023.

Note: These Fragments will generate for EDBC Benefit Months prior to January 2024. Starting with the January 2024 EDBC Benefit Month these NOA fragments will no longer generate.

2.2.2 Description of Change

Update the logic to no longer generate the existing Non-MAGI reason fragments relating to Asset and Property effective Dec 31st 2023.

Note: The existing Reason Fragment text can be found in #Supporting Document 2.

ID	Fragment Name	Available Languages*
6603	MC_CH_CEC_UNVERIF_RESOURCE_M206	EN, SP, CA, AE, HM, LA, RU, AR, FA, VI, KO, TG, CH
6641	MC_CH_CEC_RESOURCE_OVER_LIMIT_M357	EN, SP, AE, AR, CA, CH, FA, HM, KO, LA, RU, TG, VI
7436	Q_DN_RESOURCES_UNVERIF_Q302	EN, SP, AE, CA, CH, KO, RU, TG, VI
6525	MC_TN_RSRCS_EXCEED_LIMIT_M052	EN, SP, AE, CA, CH, KO, RU, TG, VI
6526	MC_DN_RSRCS_EXCEED_LIMIT_M052	EN, SP, AE, CA, CH, KO, RU, TG, VI
6545	MC_TN_FAIL_LTCRP_TRANSFER_M095	EN, SP, AE, AR, CA, CH, FA, HM, KO, LA, RU, TG, VI

2.3 Update Non-MAGI Reason Fragments Verbiage related to Property.

2.3.1 Overview

The following Fragments currently contain Property related text. The fragments will be updated to no longer include Property related text.

2.3.2 Description of Change

List of Impacted Fragments:

Fragment Name	Current Text	Updated Text
MC_TN_FAIL_TO_RESPOND_M4 27 Id: 9600 (Will be updated only in English)	Your <FULL_PGM_NAME> is ending on <EffectiveDiscontinuanceDate> because you did not provide the renewal information that we asked for. We need you to give us information about the following to see if you can still get <PGM_NAME>: • Proof of your property. Some examples of proof of your property are bank account statements, investments statements, or titles for property that you own. • Proof of your income. Some examples of proof of your income are a paystub, your most recent tax return, a letter from your employer, or a benefits award letter. Please call us, visit your county social services office, or return your completed and signed renewal form to give us this information. You can still get <PGM_NAME>, but you need to give us more information. We need it within 90 days, by <McVerificationDueDate>. We can give you <PGM_NAME> from <MonthDayYear1> if you are eligible. If we do not get the information by <McVerificationDueDate2>, you must reapply for <PGM_NAME>.	Your <FULL_PGM_NAME> is ending on <EffectiveDiscontinuanceDate > because you did not provide the renewal information that we asked for. We need you to give us information about the following to see if you can still get <PGM_NAME>: Proof of your income. Some examples of proof of your income are a paystub, your most recent tax return, a letter from your employer, or a benefits award letter. Please call us, visit your county social services office, or return your completed and signed renewal form to give us this information. You can still get <PGM_NAME>, but you need to give us more information. We need it within 90 days, by <McVerificationDueDate>. We can give you <PGM_NAME> from <MonthDayYear1> if you are eligible. If we do not get the information by <McVerificationDueDate2>, you must reapply for <PGM_NAME>.
MC_CH_CONT_ELIG_UNDER_ MN_MI_PROGS_M181 Id : 6587 (Will be updated in English and Spanish languages all	Effective <EffectiveMNMIDate>, the following person(s) continue(s) to be eligible to benefits under the Medically Needy or Medically Indigent Program:	Effective <EffectiveMNMIDate>, the following person(s) continue(s) to be eligible to benefits under the Medically Needy or Medically Indigent Program:

other languages will be turned off)	<ApprovedPersons>	<ApprovedPersons>
	The share of cost (if any) is listed <BUDGET_LOCATION>.	The share of cost (if any) is listed <BUDGET_LOCATION>.
	In order to remain eligible for this program, you must:	In order to remain eligible for this program, you must:
	- Report within ten days any significant changes that could affect your eligibility such as changes in your Income, property, medical condition, or household situation.	- Report within ten days any significant changes that could affect your eligibility such as changes in your Income, medical condition, or household situation.
	Receiving these Medi-Cal benefits does not count against any CalWORKs program time limits.	Receiving these Medi-Cal benefits does not count against any CalWORKs program time limits.

2.4   Remove CT662 Entries and Code References for Obsoleted fragments.

2.4.1 Overview

Remove code references to the fragments listed below and turn off the CT662 Entries for threshold languages as the English language fragment is already turned off.

Note: This effort is to remove out of date references/code of NOAs that no longer generate in production today.

2.4.2 Description of Change

List of impacted fragments.

ID	Fragment Name
6549	MC_DN_UNVERIF_UNEARNED_INCOME_M107
6550	MC_TN_UNVERIF_UNEARNED_INCOME_M107
6897	MC_TN_FAIL_REDETER_RESPONSE_M400
6320	Q_TN_FAIL_REDETER_RESPONSE_Q400

2.5 Automated Regression Test

2.5.1 Overview

Disable the existing automated regression test scripts that verify the Medi-Cal Property value(s), and those that verify the Medi-Cal program is Denied or Discontinued due to an individual being over the MC property limit. Create new regression test scripts to verify that Medi-Cal EDBC does not fail individuals with unverified property records (verification 'Overdue', 'Pending', or 'Refused').

2.5.2 Description of Change

1. Disable / deprecate existing regression scripts that perform the following verifications in the Regression Test Suite:
   a. Medi-Cal property limit values, including the MSP and Sneede values
   b. Medi-Cal closure (Denied, Discontinued) due to an individual being over the property limit

   Technical Note: An estimated 16 scripts would be deprecated.

2. Create new regression scripts to verify that Medi-Cal EDBC does not fail (Deny or Discontinue) an individual with property having each of the following verification statuses:
   a. Overdue
   b. Pending
   c. Refused

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	ACWDL 22-25	
2	Correspondence	Supporting Document 2	Existing Reason Fragment Text that needs to be obsoleted.xslx

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-252048

Add E-Sign Functionality to LA County Additional
CalSAWS Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lalitha Valamarthi
	Reviewed By	Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/13/2023	1.0	Original	Lalitha Valamarthi
07/24/2023	1.1	Adding new requirements	Lalitha Valamarthi
09/26/2023	1.2	Content Revision to remove the recommendation for CSF 100 form.	Lalitha Valamarthi
10/25/2023	1.3	Design clarification to add an assumption related to LA IVR functionality	Lalitha Valamarthi

Table of Contents

1   OVERVIEW

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

1.1   Current Design

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

1.2   Requests

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

1.3   Overview of Recommendations

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

1.4   Assumptions

1. Form Names and Form numbers will not be updated with this SCR. The only changes for the forms identified will be the addition of E-signature functionality.
2. Adding E-Sign to the forms will give users the ability to do both E-sign and Telephonic signature.
3. "IVR" eSignature Option for Los Angeles County will be enabled with SCR CA-252194.

2   RECOMMENDATIONS

2.1   Add E-Sign functionality to the requested LA Forms

2.1.1   Overview

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

2.1.2 Description of Change

1. Perform a DCR to DOC_TEMPL to update the values for ESIGN_IND for the forms listed below.

    - ABP 1676-2
    - ABP 1676-4 GRMH
    - CW 86-LA
    - GN 6006A
    - GN 6006B
    - GN 6006C
    - GN 6006D
    - GN 6135
    - GN 6137
    - GN 6137A
    - GN 6137B
    - GN 6372
    - GR 21
    - GR 6
    - PA 146
    - PA 167
    - PA 1815
    - PA 1913
    - PA 2124
    - PA 6011
    - PA 6012
    - PA 6056
    - PA 908
    - REP 3

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

2. ~~Perform a DCR to DOC_TEMPL to update the value for TEMPL_COUNTY_CATGRY of the non-state form CSF 100 to be visible for all counties, including LA County.~~

3. Update the program drop-down on the Document Parameters page for the GN 6135, GN 6137B, and PA 1913.

    a. Add WTW in addition to the currently available programs in the Program field on the Document Parameters page for the GN 6135.

    b. Add REP in addition to the currently available programs in the Program field on the Document Parameters page for the GN 6137B.

    c. Add WTW, REP, and CalWORKs to the Program field on the Document Parameters page for the PA 1913.

4. Update form PA 1913 to add a CSF 147 coversheet and add the print

options.

    a. Add the mailing coversheet CSF 147 to the form PA 1913.

    b. Include the following parameters for the packet on the Document Parameters page:

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

        i. Case Number

        ii. Customer Name

        iii. Program

        iv. Language

Document Parameters   ❓Help

✱- Indicates required fields   [Generate Form]   [Generate Blank Template]   [Cancel]

Case Number: ✱   Customer Name: ✱

[_____] [Go]   [- Select - ▾]

Program: ✱

[- Select - ▾]

Language: ✱

[English ▾]

[Generate Form]   [Generate Blank Template]   [Cancel]

    c. The packet has the following print options:

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

    I. The 'Print Local without Save' option is only available when a blank template is generated.

    II. The 'Print and Save' options are only available when generating the packet in the context of the case.

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

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Mailing Requirements:

Mail-To (Recipient): The Individual selected on the 'Customer Name' dropdown on the Document parameter page.

Mailed From (Return): Program Worker's Office Address
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Clock Indicator: N
Electronic Signature: Yes
Post to Self Service Portal: Yes

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-255762
Task Mgmt: Enhancements to Task Time Processing

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/12/2023	1.0	Initial Revision	Vallari Bathala
10/25/2023	1.1	Updated the image in section 2.4.2 Export Template Mockup to remove leading 0's in the Total Duration column. Updated section 2.4.3 Description of Changes to specify that the leading 0's in the Total Duration column will not display.	Vallari Bathala

Table of Contents

1   OVERVIEW

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

1.1   Current Design

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

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

1.2   Requests

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

1.3   Overview of Recommendations

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

1.4   Assumptions

1. No impact to analytics/dashboards.

2 RECOMMENDATIONS

2.1 Task Settings

2.1.1 Overview

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

2.1.2 Task Settings Mockup

Task Settings

✱- Indicates required fields	Save Cancel

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

Save   Cancel

Figure 2.1.2-1 – Task Settings – Edit Mode

Task Settings

✱- Indicates required fields

Edit

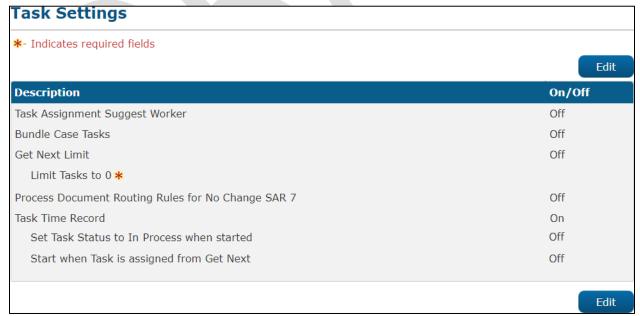| Description	On/Off
Task Assignment Suggest Worker	Off
Bundle Case Tasks	Off
Get Next Limit	Off
Limit Tasks to 0 ✱	
Process Document Routing Rules for No Change SAR 7	Off
Task Time Record	On
Set Task Status to In Process when started	Off
Start when Task is assigned from Get Next	Off

Edit

Figure 2.1.2-2 – Task Settings – View Mode

2.1.3 Description of Changes

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

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

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

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Task Pop-Up: Task Detail Page

2.2.1 Overview

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

2.2.2 Task Detail Page Mockup

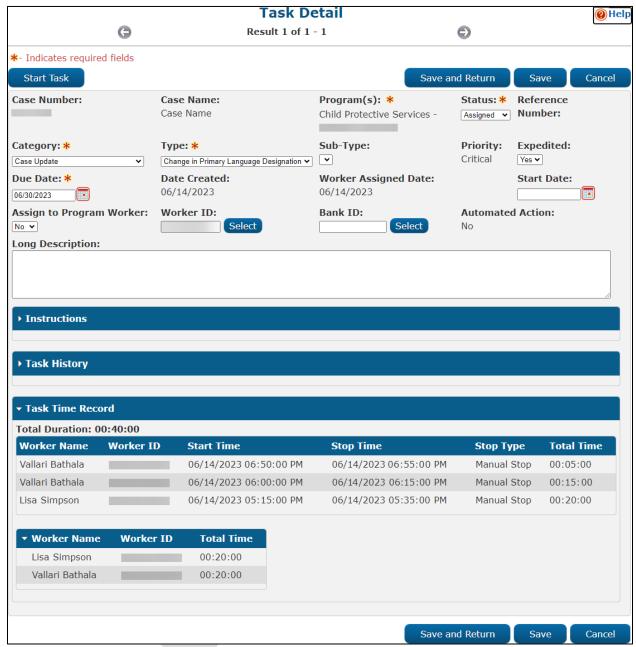**Figure 2.2.2-1 – Task Detail Page**

2.2.3 Description of Changes

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

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

    a. Worker Name – This column will display the staff first and last name.

    b. Worker ID – This column will display the Worker ID value.

    c. Total Time – This column will display an aggregate sum of detailed Task Time Record entries with a start and stop time for the Worker.

2. Update the "Start Task" button to automatically set the Task to In-Process Status if the "Set Task Status to In Process when started" setting on the Task Settings page is turned on for the county.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Task Pop-Up: My Tasks Page

2.3.1 Overview

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

2.3.2 Description of Changes

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

2.3.3 Page Location

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

Page is accessible through Utility bar's Tasks Option

2.3.4 Security Updates

N/A

2.3.5 Page Mapping

N/A

2.3.6 Page Usage/Data Volume Impacts

N/A

2.4 Task Export: Templates

2.4.1 Overview

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

2.4.2 Export Template Mockup

	A	B	C	D	E	F		T	U	V	W	X	Y
1	Case Numbe	Case Name	Progran	Langua	Start Dat	Due D		e Date Complete	Total Duration	Submit Month	Appoitnment [	ES	Long Descriptic
2		Case Name	CS			06/30			0:40:0				
3													

Figure 2.4.2.1 – Export Template

2.4.3 Description of Changes

1. Total Duration – This column will display the value of the "Total Duration" attribute displayed in the Task Time Record panel of the Task Pop-Up: Task Detail page. <mark>The leading 0's will not display for the total time.</mark> If a Task does not have any time logged, this value will be blank.

2.4.4 Page Location

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

Page is accessible through Utility bar's Tasks Option

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4   REQUIREMENTS

N/A

5   MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7   APPENDIX

N/A