

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-266312

ACL 23-80 Increase ABAWD Age Limit and Add
Exemptions for Homeless, Veterans, and
Individuals in Foster Care

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/14/2023	1.0	Initial Draft	Connor ODonnell, Eric Wu, Howard Suksanti, Sridhar Mullapudi, Sujit Neupane, Vallari Bathala
10/11/2023	1.1	<ol style="list-style-type: none"> 1. Added new assumption 1.4.8 2. Updated recommendations 2.1, 2.2, 2.3, 2.4 to clarify the ABAWD determination is for active/ineligible CalFresh program member. 3. Updated recommendation 2.4 to automate 'Foster Youth' Exemption determination. 4. Added recommendation 2.5 to create journal entries when batch processes ABAWD for a CalFresh household. 5. Updated recommendation 2.7 to include the 'Foster Youth' population. 6. Updated recommendation 2.8 to include trigger conditions to identify members that qualify for 'Foster Youth' exemption. 	Howard Suksanti, Sridhar Mullapudi
10/17/2023	1.2	<ol style="list-style-type: none"> 1. Added clarification to recommendation 2.4.2. 2. Added new recommendation to update the existing 'Under Age 18' exemption ABAWD determination. 3. Update recommendations 2.3.2, 2.9.2, and 2.16 to check for veterans discharge date. 4. Added new assumption 1.4.9 	Sridhar Mullapudi

10/31/2023	1.3	1. Added Assumption 1.4.10. 2. Updated recommendation 2.8 to include discharge date check.	Sridhar Mullapudi

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1 OVERVIEW

1.1 Current Design

Under existing federal policy, an ABAWD is a CalFresh recipient, age 18 through 49, who is able-bodied without dependent children and does not meet the criteria for an exemption from the ABAWD time limit.

ABAWD Status is determined and tracked in CalSAWS for CalFresh Individuals. This status is created and updated through both CalFresh EDBC and a separate batch process which determines a monthly status based on ABAWD criteria and work registration exemptions. When there is a change that impacts ABAWD determination, if the worker did not run EDBC right away, the changes to the ABAWD determination will be processed by ABAWD Determination Cyclic batch job. The ABAWD changes will be available to view after the batch run. Please find more details on CA-239421.

The Time Limits page tracks ABAWD time limits for each person subject to the time limit. A daily batch job synchronizes the ABAWD Time Limit Month based on the ABAWD Status.

1.2 Requests

1. Update the ABAWD age limit requirements to gradually increase the age of individuals who qualify for ABAWD exemption as follows:
 - a. Effective September 1, 2023, the age limit for ABAWD exemption shall increase to age 51 and older.
 - b. Effective October 1, 2023, the age limit for ABAWD exemption shall increase to age 53 and older.
 - c. Effective October 1, 2024, the age limit for ABAWD exemption shall increase to age 55 and older.
2. Exempt individuals that are experiencing homelessness from ABAWD requirements.
3. Exempt Veterans from ABAWD requirements.
4. Exempt individuals aged 24 or younger and in foster care on their 18th birthday from ABAWD requirements.
5. Update 'Under Age 18' ABAWD exemption determination to exempt individual for the benefit month even when they turn 18 on the 1st of the benefit month.
6. Update ABAWD notices
7. Update ABAWD Sweep Job trigger conditions.
8. Create a new Task to prompt the Worker to assess an 18-year-old individual for exemptions.

1.3 Overview of Recommendations

1. Update the age limit requirements to gradually increase the age of those subject to the ABAWD time limit.
2. Add new ABAWD requirements to exempt recipients that are determined to be experiencing homelessness.

3. Add new ABAWD requirements to exempt veterans from ABAWD requirements.
4. Add new ABAWD requirements to exempt foster youth from ABAWD requirements.
5. Update 'Under Age 18' ABAWD exemption determination to exempt individual for the benefit month even when they turn 18 on the 1st of the benefit month.
6. Add new journal entry when batch processes ABAWD determination.
7. Online – Add a new exemption type to the ABAWD Exemption Detail page for CalFresh individuals who are 24 years old or younger who were in Foster Care on or after their 18th birthday.
8. One time batch ABAWD trigger to update ABAWD status and status reason.
9. Batch – Update ABAWD Batch Sweep jobs.
10. Update 'ABAWD Time Limit Month Detail' page to display the new status reason for ABAWD exemptions.
11. Update ABAWD Time Limit Sync Job to capture the new ABAWD exemption status reason.
12. Create a new Automated Action to alert the Worker to evaluate an individual for ABAWD exemptions when the individual is going to turn 18 years old.
13. Update NOA Message fragments for Time Limit Age Changes.
14. Updates to forms for Time Limit Age Changes.

1.4 Assumptions

1. There is no impact to the EICT batch job since the EICT Batch job is targeted to be decommissioned around 10/31/2023 which is prior to this SCR implementation date.
2. There is no impact to WDTIP Interface.
3. The 4 criteria mentioned in the ACL 23-80 for Individuals experiencing homelessness shall be determined by the worker. Similar to current determination for CalFresh homeless shelter deduction, living arrangement type of 'Homeless' shall be used by the worker if the individual qualifies for this exemption.
4. ABAWD changes to STAT47 and any other reports changes are targeted through SCR CA-267560.
5. ABAWD changes to Forms and NOA not targeted with this SCR shall be addressed through SCR CA-268124.
6. The trigger condition for existing Batch ABAWD Sweep job already detects when there is a Living Arrangement record of type Homeless. The batch triggers ABAWD for current month till the come-up month.
7. The trigger condition for existing Batch ABAWD Sweep job already detects when there is a 'ABAWD Exemption Detail' page record changed/created.
8. Foster Care cases converted as shell cases or out-of-state Foster Care cases shall not be identified for 'Foster Youth' exemption, users can add an OPA for 'Foster Care' on 'Other Program Assistance Detail' page or add an ABAWD exemption on 'ABAWD Exemption Detail' page as appropriate.
9. Discharge date is not a required field on the 'Military/Veterans Detail' page. If the field is populated, ABAWD determination shall use the value to determine 'Veterans' exemption. If the value is not available users can add an ABAWD exemption for 'Veteran' in the 'ABAWD Exemption Detail' page.

10. Per existing functionality, ABAWD logic checks to see if the participant qualifies for any ABAWD exemptions in a pre-defined priority order.

2 RECOMMENDATIONS

2.1 Update ABAWD Age Requirements

2.1.1 Overview

CalFresh recipients that are 50 years or older are exempt from the ABAWD requirements. Update the age limit requirements to gradually increasing the age limit of individuals that qualify for ABAWD exemption.

2.1.2 Description of Changes

1. Update the ABAWD age limit requirements for **all Active/Ineligible CalFresh Member** to gradually increases the age of individuals who qualify for ABAWD exemption as follows:
 - a. Effective September 1, 2023, the age limit for ABAWD exemption shall increase to age 51 and older.
 - b. Effective October 1, 2023, the age limit for ABAWD exemption shall increase to age 53 and older.
 - c. Effective October 1, 2024, the age limit for ABAWD exemption shall increase to age 55 and older.
2. Update existing ABAWD status reason 'Age 50 or older' (CT2623_50) as follows:
 - a. Short Decode Name: 'Over Age Limit'
 - b. Long Decode Name: 'Over Age Limit'

2.1.3 Programs Impacted

CalFresh

2.1.4 Performance Impacts

None

2.2 New ABAWD Exemption for Individuals Experiencing Homelessness

2.2.1 Overview

CalFresh individuals experiencing homelessness are not exempt from the ABAWD requirements. Add new ABAWD requirements to exempt recipients that are determined to be experiencing homelessness.

2.2.2 Description of Changes

1. Update the ABAWD requirements to evaluate if the CalFresh recipient is experiencing homelessness and exempt this individual from ABAWD requirements.
Active/Ineligible CalFresh Member is determined to be experiencing homelessness if they meet the following criteria:
 - a. Has a 'Living arrangement Type' of 'Homeless' for the benefit month.
 - b. Active CalFresh member for the benefit month.
 - c. Benefit month is on or after 09/01/2023.
2. Add new 'ABAWD Status Reason' (CT2623). This new status reason shall be used for individuals determined to be experiencing homelessness and are set to 'Exempt' status for ABAWD determination.
 - a. Short Decode Name: 'Homeless'
 - b. Long Decode Name: 'Homeless'

Technical note:

 - a. Reference column1 maps to the corresponding 'Time Limit Status Reason Code' (CT863) being added through recommendation 2.7.2.1.
 - b. The priority of this status reason shall be after determination of 'Applied for Disability Benefits' and prior to 'Participating in an ORR Training Program at Least Half Time'.

2.2.3 Programs Impacted

CalFresh

2.2.4 Performance Impacts

None

2.3 New ABAWD Exemption for Veterans

2.3.1 Overview

CalFresh Recipients that served in the United States Armed Forces and have been since discharged are classified as veterans. Veterans who

were honorably or dishonorably discharged are exempt from the ABAWD time limits. Add new ABAWD requirements to exempt veterans from ABAWD requirements.

2.3.2 Description of Changes

1. Update the ABAWD requirements to evaluate if the CalFresh recipient is a veteran and exempt this individual from ABAWD requirements. **Active/Ineligible CalFresh Member** is determined to be a veteran if they meet all the following criteria:
 - a. Has a record of type 'Military/Veterans'.
 - b. **Discharge date** is in or before the benefit month.
 - c. Benefit month is on or after 09/01/2023.Or,
 - a. Has an exemption record of type 'Veteran' in the 'ABAWD Exemption Detail' page for the benefit month.
 - b. Benefit month is on or after 09/01/2023.
2. Add new 'ABAWD Status Reason' (CT2623). This new status reason shall be used for individuals determined to be veterans and are exempt from ABAWD time limits requirements.
 - a. Short Decode Name: 'Veteran'
 - b. Long Decode Name: 'Veteran'Technical note:
 - a. Reference column1 maps to the corresponding 'Time Limit Status Reason Code' (CT863) being added through recommendation 2.7.2.1.
 - b. The priority of this status reason determination shall be after determination of 'Pregnancy' and prior to 'Obviously Unfit for Employment' due to medical conditions.

2.3.3 Programs Impacted

CalFresh

2.3.4 Performance Impacts

None

2.4 New ABAWD Exemption for Foster Youth

2.4.1 Overview

CalFresh Recipients aged 24 or younger who were in foster care on or after their 18th birthday are exempt from ABAWD requirements. Update

ABAWD determination to exempt individuals that meet the exemption criteria with 'Foster Youth' exemption reason.

2.4.2 Description of Changes

1. Update the ABAWD requirements to evaluate if the CalFresh recipient is a foster youth and exempt this individual from ABAWD requirements. **Active/Ineligible CalFresh Member under the age of 25 or turning 25 within the benefit month** is determined to be a 'Foster Youth' if they meet the following criteria:

- a. Is 'Active' in foster care program on their 18th birthday.
- b. Benefit month is on or after 09/01/2023.

Or,

- a. Has an OPA record for 'Foster Care' and their 18th birthday is between the OPA record begin and end date.
- b. Benefit month is on or after 09/01/2023.

Or,

- a. Has an exemption record of type 'Foster Youth' in the 'ABAWD Exemption Detail' page for the benefit month.
- b. Benefit month is on or after 09/01/2023.

Example: Person turning 25 on 10/01/2023 is active on CalFresh program. Person was active in Foster Care on their 18th birthday. Person qualifies for 'Foster Youth' exemption until the end of 10/2023 benefit month. Person shall no longer be qualified for this exemption from 11/2023 benefit month.

Technical note:

- a. Reference column1 for status reason 'Foster Youth' maps to the corresponding 'Time Limit Status Reason Code' (CT863) being added through recommendation 2.7.2.1.
- b. The priority of this status reason determination shall be after determination of 'Child under 18 in the household' and prior to 'Pregnancy'.

2.4.3 Programs Impacted

CalFresh

2.4.4 Performance Impacts

None

2.5 Update ABAWD Exemption for Under Age 18

2.5.1 Overview

CalFresh Recipients under the age of 18 are exempt from ABAWD determination. Current logic does not exempt the individual for 'Under Age 18' if they turn 18 years old on the first of the month. Update the existing 'Under Age 18' exemption determination logic to exempt individuals until the benefit month in which they turn 18.

2.5.2 Description of Changes

1. Update the ABAWD 'Under Age 18' exemption determination logic to exempt Active/Ineligible CalFresh Member until the benefit month in which they turn 18.

Example: Individual turns 18 on 10/01/2023. Individual qualifies for 'Under Age 18' exemption until end of October 2023 benefit month. Individual is no longer effective 11/2023

2.5.3 Programs Impacted

CalFresh

2.5.4 Performance Impacts

None

2.6 New Journal Entry for Batch ABAWD

2.6.1 Overview

Automated journals entries shall be created when batch runs ABAWD rules and when there is a change to the ABAWD status or status reason.

2.6.2 Description of Changes

1. Create journal entry when ABAWD determination is processed by batch ABAWD job and there was a change to the ABAWD status or status reason.

Journal Entry	Description
New/Update	New

Journal Entry	Description
Journal Category (CT278)	Eligibility (EL)
Journal Type (CT141)	Narrative (06)
Short Description	Batch processed ABAWD determination for the household.
Long Description	Batch updated ABAWD determination as follows: 1. <Person Name> is now <ABAWD Status>, <ABAWD Status Reason> as of benefit month <Effective Month>.
Trigger Condition	Batch ran ABAWD determination for the CalFresh Household and there was a change in ABAWD status or status reason for the benefit month

2.6.3 Programs Impacted

CalFresh

2.6.4 Performance Impacts

None

2.7 ABAWD Exemption Detail

2.7.1 Overview

The ABAWD Exemption Detail page is a page where workers can add exemptions for a person from ABAWD. Two new exemptions need to be added CalFresh individuals, one for individuals 24 years of age or younger who were in Foster Care at the age of 18 or older, and another for individuals who are veterans.

2.7.2 ABAWD Exemption Detail Mockup


ABAWD Exemption Detail

*- Indicates required fields

Save and Return Cancel

Name: *
- Select -

Type: *
- Select -
- Select -
Applied for Disability Benefits
Foster Youth
Participating in an ORR Training Program at Least Half Time
Veteran

End Date:
 

Save and Return Cancel

Figure 2.5.2.1 ABAWD Exemption Detail page

2.7.3 Description of Changes

1. Add the following ABAWD exemption 'Type' on the 'ABAWD Exemption Detail' page:
 - a. Foster Youth
 - b. Veteran

2.7.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: ABAWD Exemption**

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 One Time ABAWD Batch Trigger

2.8.1 Overview

One time batch ABAWD run shall be triggered to identify the following population:

1. Has an exemption for age limit requirements that no longer qualify for this exemption.
2. Has a living arrangement type 'Homeless' and is currently not exempt from ABAWD requirements.
3. Has a record of type 'Military/Veterans' with a 'Discharge Date' in or before the benefit month and is currently not exempt from ABAWD requirements.

2.8.2 Description of Change

1. Trigger one time batch ABAWD to run ABAWD rules for all benefit months that an active CalFresh member qualifies for any of the following conditions:
 - a. Has an ABAWD exemption for age limit requirement (CT2623_50) and is 50 years or younger in any benefit month from 09/2023 till come-up* month.
 - b. Has an ABAWD exemption for age limit requirement (CT2623_50) and is 52 years or younger in any benefit month from 10/2023 till come-up* month.
 - c. Has a living arrangement type 'Homeless' for any part of the benefit month and is not 'Exempt' from other ABAWD requirements in any benefit month from 09/2023 till come-up* month.
 - d. Has a record of type 'Military/Veterans' in the 'Military/Veterans detail' page with a 'Discharge Date' in or before the benefit month and is not 'Exempt' from other ABAWD requirements in any benefit month from 09/2023 till come-up* month.
 - e. Is under 25 years old and has 'Foster Care' OPA record where the 18th birthday is between the begin and end date of the OPA record. And, is not 'Exempt' from other ABAWD requirements in any benefit month from 09/2023 till come-up* month.
 - f. Is under 25 years old and is active on Foster Care program on their 18th birthday. And, is not 'Exempt' from other ABAWD requirements in any benefit month from 09/2023 till come-up* month.

* Latest benefit month available in CalSAWS system at the time of implementation.

2.8.3 Counties Impacted

All CalSAWS counties

2.8.4 Data Volume/Performance

N/A

2.8.5 Failure Procedure/Operational Instructions

N/A

2.9 Batch – Update ABAWD Sweep Cyclic module.

2.9.1 Overview

The Batch ABAWD Sweep Cyclic batch jobs identify all CalFresh cases that should be reevaluated for ABAWD due to data changes that may result in a change to the recipient's current ABAWD status.

2.9.2 Description of Change

1. Update the Batch ABAWD Sweep Cyclic module (PERS DOB SWEEP - PB00T237) on the age range condition as below:

Increase the age range on the batch job to the following:

- a. Effective September 1, 2023, the age limit for ABAWD Exemption shall increase to age 51 and older.
- b. Effective October 1, 2023, the age limit for ABAWD Exemption shall increase to age 53 and older.
- c. Effective October 1, 2024, the age limit for ABAWD Exemption shall increase to age 55 and older.

2. Military/Veterans:

- a. Create a new Batch ABAWD Sweep Cyclic job to detect change on the Military/Veteran records.

CalFresh recipient is determined to be a veteran if they meet all the following criteria:

- The 'Military/Veterans' record has an Enlistment Date between the batch Last Success Date and Batch Run Date.
- Discharge date is in or before the benefit month.
- ABAWD Benefit month is on or after 09/01/2023.
- The person is Active or Ineligible on a CalFresh program.

The batch will trigger ABAWD for current month till the come-up month.

- b. Create a BPCR and BSCR to scheduling the new Military/Veterans ABAWD Sweep Cyclic job.

3. Foster Youth:

- a. Create a new Batch ABAWD Sweep Cyclic job to detect change on the Foster Youth scenario.

CalFresh recipient is determined to be Foster Youth Exemption if they meet all the following criteria:
(Trigger to add the exemption 1):

- There is an Other Program Assistance record with the type of Foster Care.

- The 18-year birthday is between the OPA Begin and End Date.
- The person is under 25 years old.
- The person is Active or Ineligible on a CalFresh program.
- The person does not have an ABAWD Exemption.

Or

(Trigger to add the exemption 2):

- The individual is active on Foster Care program.
- The 18-year birthday is between the Active Program Person Status Begin and End Date.
- The person is under 25 years old.
- The person is Active or Ineligible on a CalFresh program.
- The person does not have an ABAWD Exemption.

Or

(Trigger to remove the exemption)

- The person is 25 years old or older.
- The person is Active or Ineligible on a CalFresh program.
- The person has an ABAWD Exemption for Foster Youth.

The batch will trigger ABAWD for current month till the come-up month.

- b. Create a BPCR and BSCR to scheduling the new Foster Youth Sweep Cyclic job.

2.9.3 Execution Frequency

Continuously throughout business hours.

2.9.4 Key Scheduling Dependencies

Before the ABAWD Determination Thread Jobs.

2.9.5 Counties Impacted

All CalSAWS counties

2.9.6 Category

Core.

2.9.7 Data Volume/Performance

N/A

2.9.8 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.)

2.10 ABAWD Time Limit Month Detail

2.10.1 Overview

The "ABAWD Time Limit Month Detail" page will allow the User to edit or view the details of a Time Limit Month for an Abled Bodied Adults Without Dependents (ABAWD). Below describe required changes for the SCR.

2.10.2 Description of Changes

1. Add the following Status Reasons available for selection when the page is in Create/Edit mode and Status is 'Exempted'.

Time Limit Status Reason (Category 863)
Homeless
Veteran
Foster Youth

Technical Note: Above update requires adding mapping in Code Hierarchy.

2.10.3 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Time Limit**

2.10.4 Security Updates

No change.

2.10.5 Page Mapping

No change.

2.10.6 Page Usage/Data Volume Impacts

No change.

2.11 Fiscal - Update ABAWD Time Limit Sync Job

2.11.1 Overview

The ABAWD Time Limit Sync job (PB00E307) runs daily to align individual ABAWD time limit months with the latest ABAWD Status determination data from the ABAWD_STAT table. The Sync job maintains individual month statuses to reflect updates made to any individual's ABAWD status throughout the current 36-month ABAWD calendar.

Below describe the required changes for the SCR.

2.11.2 Description of Change

1. Update the batch to map below new ABAWD Status Reasons when ABAWD determination are 'Exempt' status:

ABAWD Status Reason (Category 2623)	Time Limit Status Reason (Category 863)
Homeless	Homeless
Veteran	Veteran
Foster Youth	Foster Youth

Note:

- Above update requires adding new Time Limit Status Reasons for Category 863.
- The existing ABAWD status reason 'Age 50 or older' (CT2623_50) will continue to be mapped with Time Limit Status Reason 'Age'. Updating its Long/Short Decode Name in 2.1.2.2 will not impact the mapping.

2.11.3 Execution Frequency

No change.

2.11.4 Key Scheduling Dependencies

No change.

2.11.5 Counties Impacted

All CalSAWS counties

2.11.6 Data Volume/Performance

No change.

2.11.7 Failure Procedure/Operational Instructions

No change.

2.12 Automated Action Detail

2.12.1 Overview

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

2.12.2 Automated Action Detail Mockup

Automated Action Detail

[Edit](#) [Close](#)

Action Information		
Name: ABAWD: Age 18 Review Eligibility	Type: Create Task	Status: * Inactive
Program(s): CF	Run Date: 1st day of each month(Mon-Sat)	Source: Batch
Scenario: A CalFresh recipient is turning 18 years old in the following month.		

Task Information	
Task Type: *	
Due Date: Default Due Date	Default Due Date: The 1st of the next month
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Sibling Assignment: No	
Long Description: {Person_Name} will turn 18 on {Birth_Date}.	

[Edit](#) [Close](#)

Figure 2.9.2 -1 – Automated Action Detail View

2.12.3 Description of Changes

1. Implement ABAWD: Age 18 Review Eligibility Automated Action as follows:
 - a. Action Information
 - i. Name: ABAWD: Age 18 Review Eligibility
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CF
 - v. Run Date: 1st day of each month (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: A CalFresh recipient is turning 18 years old in the following month.
 - b. Task Information
 - i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: The 1st of the next month
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Sibling Assignment: No
 - viii. Long Description: {Person_Name} will turn 18 on {Birth_Date}.

2.12.4 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.12.5 Security Updates

N/A.

2.12.6 Page Mapping

N/A.

2.12.7 Page Usage/Data Volume Impacts

N/A.

2.12.8 Accessibility

The following accessibility enhancements have been identified:

- IDs used in Accessible Rich Internet Applications (ARIA) and labels must be unique.

CA-257402 will address the WCAG 2 AA minimum contrast ratio thresholds of the Chat button.

2.12.9 Page Usage/Data Volume Impacts

N/A

2.13 ABAWD: Age 18 Review Eligibility Automated Action Batch Job

2.13.1 Overview

This section describes the behavior of a new batch process that will invoke the "ABAWD: Age 18 Review Eligibility" Automated Action.

2.13.2 Description of Change

Implement a new batch process to run on the first day of the month and invoke the "ABAWD: Age 18 Review Eligibility" Automated Action for an Active Member on the CalFresh program who will turn 18 years old in the following month.

2.13.3 Execution Frequency

The batch job will be scheduled to run on the first day of the month, excluding Sundays and Holidays.

2.13.4 Key Scheduling Dependencies

None

2.13.5 Counties Impacted

All CalSAWS Counties.

2.13.6 Category

Non-Core.

2.13.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.13.8 Failure Procedure/Operational Instructions

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

2.14 Update NOA Message fragments for Time Limit Age Changes

2.14.1 Overview

Existing ABAWD verbiage in NOAs need to be updated to be dynamic and display the correct age limit based on the month it is generated for and the limit applicable for that Benefit month.

Message Fragment Name and ID:

- CF_CH_MESSAGE8 (5102)
- CF_TN_MESSAGE8 (5103)

State Form/NOA: CF 377.11

Current Program(s): CalFresh

Current Action Type:

- CF_CH_MESSAGE8 (Change Action)
- CF_TN_MESSAGE8 (Discontinuance Action)

Current Fragment Level: Program

Currently Repeatable: No

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

2.14.2 Form/NOA Verbiage

Update Fragment XDP

NOA message verbiage will be updated with variable population for the age limit that will pull the appropriate age based on EDBC Benefit Month.

Updated Languages:

All existing 13 languages (Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Lao, Korean, Russian, Spanish, Tagalog, Vietnamese)

NOA Mockups/Examples: Supporting Documents #1 for full text of updated Fragments.

Description	Existing Text	Updated Text	Formatting*
CF_CH_MESSAGE 8	<ul style="list-style-type: none"> Under age 18 or over age 49; 	<ul style="list-style-type: none"> Under age 18 or over age <ABAWD_AGE_LIMIT>; 	Arial Font size 10
CF_TN_MESSAGE8	<ul style="list-style-type: none"> Under age 18 or over age 49; 	<ul style="list-style-type: none"> Under age 18 or over age <ABAWD_AGE_LIMIT>; 	Arial Font size 10

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

2.14.3 Form/NOA Variable Population

Add/Update Fragment Variable Population

There will be one new variable for the ABAWD age limit changes.

Variable Name	Population	Formatting*
ABAWD_AGE_LIMIT	<p>This variable will populate with the age limit based on the EDBC month run.</p> <ul style="list-style-type: none"> If the EDBC month is a month prior to September 2023, the age populated will be '49'. If the EDBC month is September 2023, the age populated will be '50'. If the EDBC month is October 2023 or prior to October 2024, the age populated will be '52'. If the EDBC month is on or after October 2024, the age populated will be '54'. 	Arial Font Size 10

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

2.14.4 Form/NOA Generation Conditions

There will be no updates to the generation conditions of these NOA messages. Both will continue to generate with the NOA reasons on the CF 377.11 generated via EDBC.

2.15 Updates to Forms for Time Limit Age Changes

2.15.1 Overview

Existing ABAWD verbiage around age in Forms that are available in the Template Repository need to be updated to be editable and display the correct age limit based on the date it is generated. Form versions that generate from EDBC need to populate with the applicable age limit based on the EDBC benefit month run.

State Form:

Form	ID(s)
CF 23 SAR	Form (DOC_TEMPL): 6081
CF 377.11A	Form (DOC_TEMPL): 6343
CF 377.11B	Form (DOC_TEMPL): 6344
CF 377.11	Form (DOC_TEMPL): 6342
CF 377.11C	Form (DOC_TEMPL): 6362
SAR3	Form (DOC_TEMPL): 5913

Current Programs: CalFresh

Current Attached Form(s): N/A

Current Forms Category: Various

Current Template Repository Visibility: All Counties

Existing Languages:

Form	Currently Available Languages
CF 23 SAR (Form Fragment)	10 (Armenian, Cambodian, Chinese, English, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese)
CF 377.11A	2 (English and Spanish)
CF 377.11B	2 (English and Spanish)
CF 377.11	2 (English and Spanish)
CF 377.11C	2 (English and Spanish)
SAR3 (Form and Form Fragment)	13 (Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Lao, Korean,

	Russian, Spanish, Tagalog, Vietnamese)
--	---

2.15.2 Form/NOA Verbiage

Update Form XDP

Update Forms in Template Repository and Batch to have an editable textbox that defaults to the current ABAWD age limit based on the date generated. Update the Forms that generate via EDBC to populate the appropriate ABAWD age limit based on the EDBC Benefit Month run.

Updated Languages: This effort will update all existing languages. See 'Existing Languages' in 2.12.1 for list available for each form.

Form	Existing Text	Updated Text	Formatting*
CF 23 SAR (Form Fragment)	Page 1: "Under 18 or 50 years of age or older;"	Page 1: "Under 18 or <OVER_AGE_LIMIT> years of age or older;"	Arial Font size 10
CF 377.11A	Page 1: "Under age 18 or over age 49;"	Page 1: "Under age 18 or over age <AGE_LIMIT>;"	Arial Font size 10
CF 377.11B	Page 1: "Under age 18 or over age 49;"	Page 1: "Under age 18 or over age <AGE_LIMIT>;"	Arial Font size 10
CF 377.11	Page 1: "Under age 18 or over age 49;"	Page 1: "Under age 18 or over age <AGE_LIMIT>;"	Arial Font size 10
CF 377.11C	Page 1: "An ABAWD is a person between the ages of 18 and 49 who is not disabled and has no dependent children."	Page 1: "An ABAWD is a person between the ages of 18 and <AGE_LIMIT> who is not disabled and has no dependent children."	Arial Font size 10

SAR 3 (Form and Form Fragment)	Page 2: "Fill out this section to report reduced work or training hours for Able-Bodied Adults without Dependents (ABAWDs). ^{P} _{SEP} (ABAWDs are adults between 19 and 50 who are not caring for minor children.)"	Page 2: "Fill out this section to report reduced work or training hours for Able-Bodied Adults without Dependents (ABAWDs). ^{P} _{SEP} (ABAWDs are adults between 19 and <OVER_AGE_LIMIT> who are not caring for minor children.)"	Arial Font size 10
-----------------------------------	---	---	--------------------

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

2.15.3 Form/NOA Variable Population

There will be two new variables for ABAWD age limits.

Variable Name	Population	Formatting	Editable*/ Field Type	Template Repository Population	Populates with Form Generation ¹
OVER_AGE_LIMIT	<p>This variable will populate with the age limit based on date generated¹.</p> <ul style="list-style-type: none"> • If generated¹ in a month prior to September 2023, the age populated will be '50'. • If generated¹ in September 2023, the age populated will be '51'. • If generated¹ in October 2023 or prior to October 2024, the age populated will be '53'. 	Arial Font Size 10	Yes, Text field	Yes	Yes

	<ul style="list-style-type: none"> • If generated¹ on or after October 2024, the age populated will be '55'. 				
AGE_LIMIT	<p>This variable will populate with the age limit based on date generated either via Batch or Template Repository.</p> <ul style="list-style-type: none"> • If generated¹ in a month prior to September 2023, the age populated will be '49'. • If generated¹ in September 2023, the age populated will be '50'. • If generated¹ in October 2023 or prior to October 2024, the age populated will be '52'. • If generated¹ on or after October 2024, the age populated will be '54'. 	Arial Font Size 10	Yes, Text Field	Yes	Yes

* 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.

¹Note: When generated via EDBC (CF 23 SAR and SAR 3) the month used to determine age to populate will be the EDBC Benefit month run that generated the Form. When generated via Batch (CF 377.11A and CF 377.11B) the month used to populate the age will be the month that the document was generated (system date). When generated via Template Repository the month used to populate the age will be the month that the document was generated (system date).

Form Variables updated with this effort will be editable text fields that will pre-populate based on generation date (see variable population in table above).
waived because of high unemployment rates;

- Under 18 or 50 years of age or older;
- Medically certified as physically or mentally unfit

2.15.4 Form/NOA Generation Conditions

There will be no updates to the generation conditions of the Forms being updated with this recommendation.

2.16 Automated Regression Test

2.16.1 Overview

Update the existing automated regression test scripts that target the ABAWD age limit to use the new status reason and dynamically determine the applicant age based on the new effective dated schedule. Create new regression test scripts to verify the new ABAWD 'Exempt' status reasons are determined by CalFresh EDBC for the scenarios outlined above only.

2.16.2 Description of Changes

1. Update existing regression test scripts targeting the ABAWD age limit as follows:
 - a. Expect status reason 'Over Age Limit'.
 - b. Dynamically set the applicant age based on the current system date relative to the effective date of each increase outlined in section 2.1.2.
2. Create new regression scripts to verify the ABAWD status and status reason for the following CalFresh scenarios when EDBC is run for the intake month:
 - a. Applicant one year under the age limit is ABAWD Exempt with the 'Over Age Limit' status reason.
 - b. Applicant with Living Arrangement Type 'Homeless' is ABAWD Exempt with the 'Homeless' status reason.
 - c. Applicant with Military/Veterans type 'Military/Veterans' with a discharge date in or before the benefit month is ABAWD Exempt with the 'Veteran' status reason.
 - d. Applicant with Military/Veterans type 'Relative Of' is not ABAWD Exempt with the 'Veteran' status reason.
 - e. Applicant with ABAWD Exemption type 'Veteran' is ABAWD Exempt with the 'Veteran' status reason.
 - f. Applicant with ABAWD Exemption type 'Foster Youth' is ABAWD Exempt with the 'Foster Youth' status reason.

3. Create new regression scripts to verify the following status reasons are selectable when status 'Exempted' is selected on the ABAWD Time Limit Month Detail page in create or edit mode:
 - a. Foster Youth
 - b. Homeless
 - c. Veteran
4. Create new regression scripts to verify the Action Information and Task Information details for the 'ABAWD: Age 18 Review Eligibility' Automated Action on the Automated Action Detail page in view mode.

Technical Note: The scope of this scenario is to verify the initial values at the time of implementation only. As the values of user-editable fields are updated in the production system, these specific verifications will be deprecated.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	CF Approval NOA Message text	CA-266312 NOA Fragment Full Text.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.3	The LRS shall include the ability to take automatic action on specified case maintenance activity.	Create a new Automated Action to alert the Worker to evaluate an individual for ABWAD exemptions when the individual is going to turn 18 years old.
2.8.2.4	The LRS shall include an automated process whereby the LRS evaluates individual and household situation LRS Data in order to determine the appropriate configuration of cash, Food Stamp, and medical assistance program types and the individuals in the applicant group who are potentially eligible participants in those programs	Update automated ABAWD determination to exempt Individuals that qualify for the updated age limit exemptions, or Veterans, or Experiencing homelessness, or for foster youth.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-54731

A No Show Appraisal Appointment Automation
Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake, Vallari Bathala, Justin Dobbs, Howard Suksanti,
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena, Gingko Luna, Lien Phan, Carlos Albances,

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/07/2023	1.0	Initial Revision	Vallari Bathala, Avi Bandaranayake
10/05/2023	1.1	Added clarification on section 2.2.2	Howard Suksanti
10/26/2023	1.2	Added batch trigger conditions on section 2.2, Update Automate Action task on section 2.1	Howard Suksanti, Justin Dobb, Vallari Bathala

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1 OVERVIEW

1.1 Current Design

The system is currently adding a non-compliance status to participants who miss their Appraisal appointments even when their CalWORKs cases are discontinued. This creates additional work for both regular Welfare to Work (WTW)/ Refugee Employment Program (REP) worker as they need to manually cancel Non-Compliance Cause Determination (CD) appointments and correct the program status manually for these cases.

1.2 Requests

Prevent the system from changing the status of the WTW/REP to non-compliance when a participant misses the Appraisal appointment. A task must be created and sent to the case carrying WTW/REP Worker when the CalWORKs status changes to active.

1.3 Overview of Recommendations

1. Prevent the system from changing the status of the WTW/REP to non-compliance when a participant misses the appointment **that link to the Appraisal Activity**.
2. Create a new "Create Task" type Automated Action to alert the case carrying WTW worker when a person activates onto CalWORKs while on a WTW or REP program with a recent Appraisal appointment with Status of No Show.

1.4 Assumptions

1. **The new Automated Action will not be processed for Task creation unless a county has Activated the Automated Action.**

2 RECOMMENDATIONS

2.1 Automated Action

2.1.1 Overview

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

2.1.2 Automated Action Detail

Automated Action Detail

Edit Close

Action Information		
Name: WTW/REP Recipient: CalWORKs Activated	Type: Create Task	Status: * Inactive
Program(s): RE, WT	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: CalWORKs program has been reactivated and participant has an Appraisal Appointment with a 'No Show' status.		
Task Information		
Task Type: *		
Due Date: Default Due Date	Default Due Date: 5 business days	
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker	
Sibling Assignment: No		
Long Description: The WTW/REP participant has been reactivated on the CalWORKs program and has an appraisal appointment. Review and take appropriate action.		

Edit Close

Figure 2.1.2-1 Automated Action Detail – View Mode

Automated Action Detail

Action Information

Name: WTW/REP Recipient: CalWORKs Activated	Type: Create Task	Status: * Inactive ▾
Program(s): RE, WT	Run Date: Daily(Mon-Sat)	Source: Batch
Scenario: CalWORKs program has been reactivated and participant has an Appraisal Appointment with a 'No Show' status.		

Task Information

Task Type: * - Select - ▾	
Due Date: Default Due Date ▾	Default Due Date: 5 business days
Initial Assignment: Default Assignment ▾	Default Assignment: Current Program Worker
Sibling Assignment: No ▾	
Long Description: The WTW/REP participant has been reactivated on the CalWORKs program and has an appraisal appointment. Review and take appropriate action.	

Figure 2.1.2-1 Automated Action Detail – Edit Mode

2.1.3 Description of Changes

Add the following Create Task type Automated Action to the CalSAWS system. The Automated Action will have an initial status of Inactive and a blank Task Type. If a county Activates an Automated Action, a Task Type will be required at that time:

1. Welfare to Work Participant: CalWORKs Activated
 - a. Action Information
 - i. Name: Welfare to Work Participant: CalWORKs Activated
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): RE, WT
 - v. Run Date: Daily(Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: CalWORKs program has been reactivated and participant has an Appraisal Appointment with a 'No Show' status.
 - b. Task Information

- i. Task Type: BLANK
 - ii. Task Sub-Type: BLANK
 - iii. Due Date: Default Due Date
 - iv. Default Due Date: 5 business days
 - v. Initial Assignment: Default Assignment
 - vi. Default Assignment: Current Program Worker
 - vii. Sibling Assignment: No
 - viii. Long Description: The WTW/REP participant has been reactivated on the CalWORKs program and has an Appraisal Appointment with "No Show" status. Review and take appropriate action.
- c. This Automated Action will be invoked in the following scenario:
- i. When a CalWORKs program person is Activated on CalWORKs as an Active MEM OR as an Active MMO with a Role Reason of "FTP Immunization" (note: the CW person can be either Rescinded from a Discontinued application or reapplied on a new application). The Person must also be in a WTW or REP Program that is in Active, Pending, Good Cause status. The Person must also be associated to an Appointment with a Begin Date that is within the previous 90 calendar days and the appointment meets one of the following:
 - The appointment Category is "WTW/REP" and the appointment-type is "Appraisal Appointment" with a Status of No Show

OR

 - The appointment Category is "WTW/REP" and the appointment-type is "General Appointment" with a Status of No Show
 - The appointment is linked to a Customer Activity with a category of "Appraisal Assessment" and type of "Appraisal" that is No Show

Do NOT invoke the Automated Action if the Person is already associated to a Scheduled Appointment on or after the current day that is:

- The appointment Category is "WTW/REP" and the appointment-type is "Appraisal Appointment"
- OR
- The appointment Category is "WTW/REP" and the appointment-type is "General Appointment"

- The appointment is linked to a Customer Activity with a category of "Appraisal Assessment" and type of "Appraisal"

2.1.4 Page Validation

N/A.

2.1.5 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
Click on a hyperlink of the desired result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
The Task Navigation will display if the user profile contains the "AutomatedActionsListView" security right.

2.1.6 Security Updates

N/A.

2.1.7 Page Mapping

N/A.

2.1.8 Accessibility

The following accessibility enhancements have been identified:

- IDs used in Accessible Rich Internet Applications (ARIA) and labels must be unique.

CA-257402 will address the WCAG 2 AA minimum contrast ratio thresholds of the Chat button.

2.1.9 Page Usage/Data Volume Impacts

There are no expected page usage/volume impacts.

2.1.1 Counties Impacted

All CalSAWS counties.

2.2 Batch

2.2.1 Overview

The JB19S815D batch job will set a WTW/REP program status to non-compliance for participants who miss the appointments **that link to the Appraisal Activity**. The job currently looks at Welfare to Work and REP programs that have an active program status.

Current trigger conditions:

1. Program code in WTW, REP with Active status.
2. There is an ongoing appointment with a status of No Show/Scheduled. The appointment is linked to the activity on condition #4.
3. The appointment date is between the batch Last Success Date and Batch Run Date.
4. There is an ongoing Closed Appraisal Customer activity for No Show.
 - a. Activity category is IG – Appraisal/Assessment
 - b. Activity type is AP - Appraisal
5. There is a worker assigned to the Program.
6. There is an ongoing Mandatory Work registration with WTW/REP type code.

2.2.2 Description of Change

Update JB19S815D to not set the WTW and REP program status to non-compliance if the person is in discontinued status in the CalWORKS program as of the current month or the future month.

All other logic remains unchanged. The batch will set the status to non-compliance if the person is **not** in discontinued status on the CalWORKS program as of the current month or the future month.

New trigger conditions:

1. Program code in WTW, REP with Active status.
2. There is an ongoing appointment with a status of No Show/Scheduled. The appointment is linked to the activity on condition #4.
3. The appointment date is between the batch Last Success Date and Batch Run Date.
4. There is an ongoing Closed Appraisal Customer activity for No Show.
 - a. Activity category is IG – Appraisal/Assessment
 - b. Activity type is AP - Appraisal
5. There is a worker assigned to the Program.
6. There is an ongoing Mandatory Work registration with WTW/REP type code.
7. The person status is in Active status in CW program.

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

Los Angeles.

2.2.6 Data Volume/Performance

N/A

2.2.7 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 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.2	The LRS shall generate alert, reminder, and control descriptions that are easily understandable.	Create a new automated action to alert the case carrying GSW when the CalWORKs status changes to active.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-206290

Add Titles to the Classification Titles Field

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell
	Reviewed By	Matt Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/24/2023	1.0	Initial Draft	Connor O'Donnell

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1 OVERVIEW

This SCR is intended to update the Classification Titles for Amador County, Calaveras County, Riverside County, Stanislaus County, and Yolo County. The current list of Classification Titles will be updated with the modifications listed in this document.

1.1 Current Design

Classification Title values are identifiers specific to each county used to identify staff roles.

1.2 Requests

Update the Classification Title values for Amador County, Calaveras County, Riverside County, Stanislaus County, and Yolo County.

1.3 Overview of Recommendations

1. Update the Classification Title field on the Staff Search page for Amador County, Calaveras County, Riverside County, Stanislaus County, and Yolo County with updated sets of values.
2. Perform a data change to update staff records with new Classification Title values for Calaveras and Riverside counties.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Staff Search Page

2.1.1 Overview

The Staff Search page is used to find specific staff members, with the ability to filter by certain values.

2.1.2 Staff Search Mockup

N/A

2.1.3 Description of Changes

1. Update the Classification Title field on the Staff Search page for the following counties:
 - a. Amador County
 - i. Add the following title:
 1. Project Manager
 - b. Calaveras County
 - i. Add the following titles:
 1. Community Services Liaison
 2. Veterans Service Officer
 - ii. Update the following titles:
 1. These Classification Titles are already present in the database; therefore they will be updated in the CODE_DETL table to make them available for Calaveras County:
 - a. Change 'Eligibility Worker I' to 'Eligibility Specialist I'
 - b. Change 'Eligibility Worker II' to 'Eligibility Specialist II'
 - c. Change 'Eligibility Worker III' to 'Eligibility Specialist III'
 2. These Classification Titles will be newly added to the CODE_DETL table:
 - a. Change 'Office Assistant I' to Office Technician I'
 - b. Change 'Office Assistant II' to Office Technician II'
 - c. Change 'Office Assistant III' to Office Technician III'
 - c. Riverside County
 - i. Add the following title:
 1. Office Support Supervisor

- ii. Remove the following titles:
 1. Supervising Office Assistant I
 2. Supervising Office Assistant II
- d. Stanislaus County
 - i. Add the following titles:
 1. Contracted Employee
 2. Infrastructure Engineer I
 3. Infrastructure Engineer II
 4. Infrastructure Engineer III
 5. IT Business Analyst
 6. IT Manager
 7. NMU – Center For Human Services
 8. NMU – Partner Agency
 9. Senior Application Specialist
 10. Social Service Assistant
 11. Software Administrator I
 12. Software Administrator II
 13. Software Administrator III
 14. Software Engineer I
 15. Software Engineer II
 16. Software Engineer III
 17. Sr. IT Manager
 18. Staff Services Analyst
 19. Staff Services Coordinator
 20. Technology Specialist I
 21. Technology Specialist II
 22. Technology Specialist III
- e. Yolo County
 - i. Add the following titles:
 1. External Agency Partner
 2. Intensive Case Manager I
 3. Intensive Case Manager II
 4. Intensive Case Manager III
 5. SIU Staff

2.1.4 Page Location

- **Global: Admin**
- **Local: Office Admin**
- **Task: Staff**

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 Data Change - Update of Classification Titles for Workers in Calaveras and Riverside Counties

2.2.1 Overview

The classification titles of workers with removed or modified values need to be updated with their new values.

2.2.2 Description of Change

1. Make the following changes to staff records:
 - a. For Calaveras County
 - i. Change records with a Classification Title of 'Eligibility Worker I' to have a Classification Title of 'Eligibility Specialist I'
 - ii. Change records with a Classification Title of 'Eligibility Worker II' to have a Classification Title of 'Eligibility Specialist II'
 - iii. Change records with a Classification Title of 'Eligibility Worker III' to have a Classification Title of 'Eligibility Specialist III'
 - iv. Change records with a Classification Title of 'Office Assistant I' to have a Classification Title of 'Office Technician I'
 - v. Change records with a Classification Title of 'Office Assistant II' to have a Classification Title of 'Office Technician II'
 - vi. Change records with a Classification Title of 'Office Assistant III' to have a Classification Title of 'Office Technician III'
 - b. For Riverside County
 - i. Change records with a Classification Title of 'Supervising Office Assistant I' or 'Supervising Office Assistant II' to have a Classification Title of 'Office Support Supervisor'

2.2.3 Estimated Number of Records Impacted/Performance

102

2.3 Automated Regression Test

2.3.1 Overview

Update the existing automated regression test script that verifies the Classification Titles available to each county to reflect the changes outlined above.

2.3.2 Description of Change

Update the existing 'Staff Detail - Classification Title' regression script to:

1. Verify the new Classification Title is available for Amador County.
2. Verify the new Classification Titles are available for Calaveras County.
3. Verify the updated Classification Titles display for Calaveras County.
4. Verify the new Classification Title is available for Riverside County.
5. No longer verify the removed titles for Riverside County.
6. Verify the new Classification Titles are available for Stanislaus County.
7. Verify the new Classification Titles are available for Yolo County.

3 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

3.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

4 OUTREACH

4.1 Lists

This list will indicate which staff records had their classification titles updated from an old value to a new value.

List Name: CA-206290 Staff Records this Data Change was applied to.

List Criteria: All staff records modified in Section 2.2

Standard Columns:

- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Classification Title
- Worker First Name
- Worker Last Name

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-206290

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-247216

**Missed MC interviews are being sent CF 386
notices**

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Raj Devidi
	Reviewed By	Priya Sridharan

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/16/23	1.0	Initial Creation	Raj Devidi

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1. OVERVIEW

CalSAWS generates the CF 386 Notice of Missed Interview (NOMI) form, when the CalFresh intake or recertification interview appointment is missed.

Per Policy 63-300.461 and per ACIN I-14-06, the 'interview due by date' on the CF 386 NOMI must populate 30 calendar days following the application date, excluding weekends and holidays. When the 30th day falls on a weekend or holiday, the next business day will be populated. Also, per ACL 19-10, when a household misses their recertification interview appointment, the NOMI shall be dated to reflect the end of the current certification period, even when the certification end date falls on a weekend or a holiday.

1.1. Current Design

Currently PB00R541 batch job triggers CF 386 Notice of Missed Interview (NOMI) for households who missed their intake interview,

when,

1. CalFresh program is Pending and,
2. General appointment type with Telephone interview intake
or
Intake interview type and,
3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled'.

Or when,

1. CalFresh program is Active and,
2. General appointment type with Telephone interview intake
or
Intake interview type and,
3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled' and,
4. Appointment date is within the redetermination period and,
5. No other above listed appointments created with in the current redetermination period.

Or for households who missed their redetermination interview,
when,

1. CalFresh program is Active and,
2. General appointment type with Telephone interview recertification
or
Telephone CW/CF RE Interview, Re-Evaluation CW/CF Interview or Re-Evaluation Interview types and,
3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled' and,
4. Appointment date is within the redetermination period.

1.2. Request

1. Update the generation conditions of CF 386 Notice of Missed Interview (NOMI) to generate only if CalFresh program is pending for the intake appointment types.
2. Update the generation conditions of CF 386 Notice of Missed Interview (NOMI) to generate only if the redetermination appointment is scheduled with in the 'RE Due month' or with in the prior month of 'RE due month' for the redetermination appointment types.

1.3. Recommendation

1. Update the generation conditions in intake scenario to generate CF 386 Notice of Missed Interview (NOMI) for pending programs only. If the program is approved, then CF 386 Notice of Missed Interview (NOMI) will not trigger when household miss the intake interview appointment.
2. Update the generation conditions in redetermination scenario to generate CF 386 Notice of Missed Interview (NOMI) if the redetermination appointment is

scheduled with in the 'RE due month' or with in the prior month of 'RE due month'. If the redetermination appointment is scheduled in any other month, then CF 386 Notice of Missed Interview (NOMI) will not trigger when household miss the redetermination interview appointment.

1.4. Assumption

1. No changes to the CF 386 form verbiage.
2. No changes to the CF 386 form variable population.

2. RECOMMENDATIONS

2.1. Notice of missed interview Form CF 386 for intake

2.1.1. Overview

The CF 386 CalFresh NOMI is used to alert the customer that they have missed their CalFresh interview appointment and informs them of the due date to complete their interview or their CalFresh benefits will be denied or discontinued.

State Form: CF 386 (2/14)

Current Programs: CalFresh and CalWORKs

Current Forms Category: NOA

Form Mockups/Examples: No change to the form template/verbiage.

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

2.1.2. Description of Change

Do not to generate CF 386 Notice of Missed Interview (NOMI) if the CalFresh program is approved when household miss the intake interview appointment.

Note: No change to the existing generation conditions when CalFresh program is pending.

2.2. Notice of Missed Interview Form CF 386 for recertification

2.2.1. Overview

Do not generate CF 386 Notice of Missed Interview (NOMI) If the redetermination appointment is scheduled in any other month other than with in the 'RE due month' or with in the prior month of 'RE due month' when household miss the redetermination interview appointment.

2.2.2. Description of Change

Do not to generate CF 386 Notice of Missed Interview (NOMI) if the redetermination interview appointment is not with in the 'RE due month' or not with in the prior month of 'RE due month'.

Note: No change to the existing generation conditions other than appointment date in the redetermination scenario.

CF 386 Notice of Missed Interview (NOMI) generates when household miss the redetermination interview,

when,

1. CalFresh program is Active and,
 2. General appointment type with Telephone interview recertification or Telephone CW/CF RE Interview, Re-Evaluation CW/CF Interview or Re-Evaluation Interview types and,
 3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled' and,
 4. Appointment date is, within the redetermination due month,
- Or,
within the prior month of redetermination due month.

Example #1: The RE due date is 01/2024 and missed their CalFresh (CF) redetermination interview appointment that is scheduled on any day with in 01/01/2024 to 01/31/2024 then generate CF 386 Notice of Missed Interview (NOMI).

Example #2: The RE due date is 01/2024 and missed their CalFresh (CF) redetermination interview appointment that is scheduled on any day with in 12/01/2023 to 12/31/2023 then generate CF 386 Notice of Missed Interview (NOMI).

Example #3: The RE due date is 01/2024 and missed their CalFresh (CF) redetermination interview appointment that is scheduled on any day with in 11/01/2023 to 11/30/2023 then **DO NOT** generate CF 386 Notice of Missed Interview (NOMI).

2.2.3. Regression test

Regression test CF 386 with batch and template repository. Validate variable population on the CF 386 form.

3. SUPPORTING DOCUMENTS

Ref. #	Document	Functional Area	Description	Attachment
N/A	N/A	N/A	N/A	N/A

4. REQUIREMENTS

4.1. Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>1) Update the generation conditions in intake scenario to generate CF 386 Notice of Missed Interview (NOMI) for pending programs only. If the program is approved, then CF 386 Notice of Missed Interview (NOMI) will not trigger when participant miss the intake interview appointment.</p> <p>2) Update the generation conditions in redetermination scenario to generate CF 386 Notice of Missed Interview (NOMI) if the redetermination appointment is scheduled with in the 'RE due month' or with in the prior month of 'RE due month'. If the redetermination appointment is scheduled in any other month, then CF 386 Notice of Missed Interview (NOMI) will not trigger when participant miss the redetermination interview appointment.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-261652 High Availability: Automatic Switch over from Primary to Standby database

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Prashant Goel

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/07/2023	1.0	Initial Draft	Prashant Goel
8/21/2023	1.1	Review comments and updates	Sumeet Patil

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1 OVERVIEW

This SCR describes the design to provides end-to-end protection of customer databases during un-planned outages without impacting end user experience. This reduces the impact of service disruptions by automatically redirecting connections to surviving instances. Standby databases protect Oracle data from failures, disasters, human error, and data corruptions. Production applications can quickly switch to the standby database if the primary becomes unavailable for any reason. Data Guard adds significant high availability (HA) features, making it a comprehensive solution for HA/DR optimized for the Oracle Database.

1.1 Current Design

CalSAWS core, APIs, Contact Center and other applications connect to Primary database in production. In case of unplanned outages, the switchover from Primary database to Standby database requires manual updates to the application/API configuration files, deployments and restarts of the server.

1.2 Requests

Implement High availability for CalSAWS Oracle database to minimize user and business impact when primary CalSAWS database is unstable.

1.3 Overview of Recommendations

This SCR introduces the capability of achieving High availability within CalSAWS application by implementing Fast-Start Failover of Oracle Data Guard and making it possible for Production applications to quickly switch over to Standby database if the Primary becomes unavailable for any failures, disasters, human errors or for any other reasons.

1.4 Assumptions

- Any new Lambda's or APIs introduced in below mentioned applications will be configured with AppCot Database connection string after analyzing the potential impact.

2 RECOMMENDATIONS

This SCR introduces the capability of achieving High availability within CalSAWS application by implementing Fast-Start Failover of Oracle Data Guard and making it possible for Production applications to quickly switch over to Standby database if the Primary becomes unavailable for any failures, disasters, human errors or for any other reasons.

2.1 Overview

Oracle Data Guard is a high availability and disaster-recovery solution that provides very fast automatic failover (referred to as Fast-Start Failover) in database failures, node failures, corruption, and media failures. Oracle Data Guard maintains these Standby databases as transactionally consistent copies of the Primary database. Then, if the Primary database becomes unavailable because of a planned or an unplanned outage, Oracle Data Guard can switch any Standby database to the Primary role, thus minimizing the downtime associated with the outage. Oracle Data Guard can be used with traditional backup, restoration, and cluster technology to provide a high level of data protection and data availability.

2.2 Description of Changes

The below section outlines the list of components that will require an update to make CalSAWS Primary Database as Highly Available.

2.2.1 Database Configuration Changes

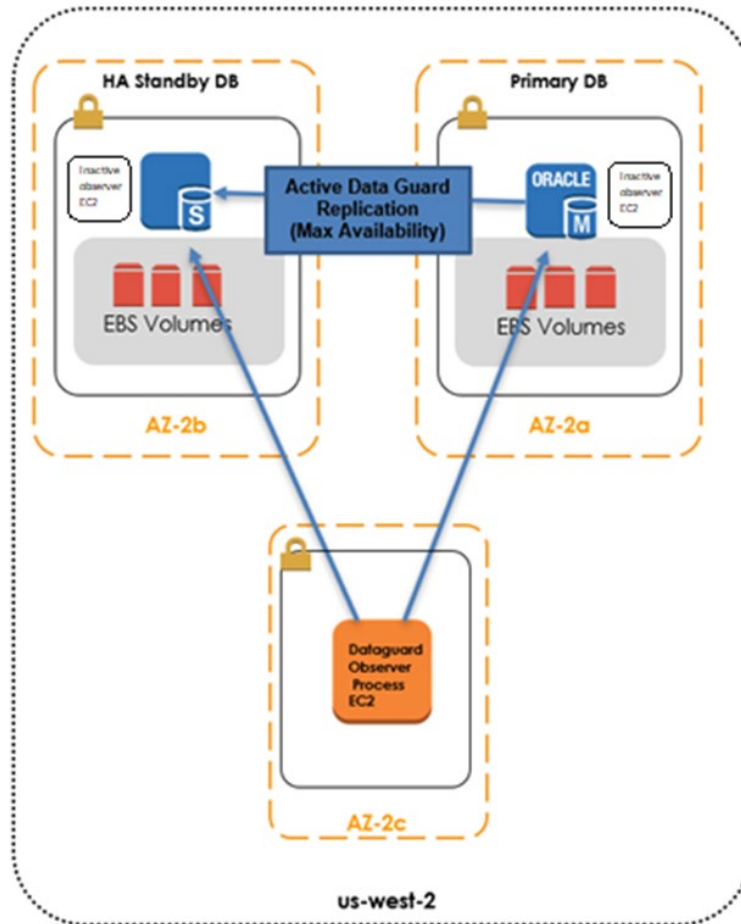
Oracle Data Guard for the Primary database will be set up and configured for Fast-Start Failover to the Secondary database in case of Primary database failure. To achieve this below are the steps to be followed considering Oracle Data Guard is already in place with broker already configured in the Production environment.

- Enable Flashback on both Primary and Secondary databases.
- Oracle Active Data guard in **maximum Protection mode** facilitates guaranteed sync replication between the primary and HA standby target in AZ 2b.
- Upon failure of Primary database Oracle Data guard observer process running from a EC2 instance in AZ-2c detects failure and switches the primary role to HA standby database.
- Middleware components will be configured with Oracle Transparent Application Continuity settings which keeps clients aware of database switchover and handles switching the connections to new primary database.
- Edit database <Primary database> and set property `FastStartFailoverTarget='<Standby database>'`
- Edit database <Standby database> set property `FastStartFailoverTarget='<Primary database>'`
- Edit configuration set property `FastStartFailoverThreshold = 30`
- Enable fast start failover.

- Add TNS entries of Primary and Standby databases to the Data Guard observer server.
- On a separate ec2 other than the Primary and the Secondary ec2 start observer process to observe both the databases for failures.
- Add inactive observer in AZA and AZC. The observer will take over if master observer process fails or is unable to connect.
- If the Primary database is not available or if there is any corruption, after the defined threshold the observer automatically switches the Secondary database to Primary database and starts to accept the application connections.
- Applications need to be configured with the HA TNS entry with the proper failover settings.

New AppCot DB Connection String:

```
AppCo = (DESCRIPTION =
(Load_Balance=off)(Failover=on)(Connect_Timeout= 30)(Retry_Count=20)
(Retry_Delay=3) (Transport_Connect_Timeout=3)
(Address_List = ( Address = (Protocol = TCP)(Host=cprod-
maindb3.appprod.aws.calsaws.net)(Port=1521)))
(Address_List =( Address = (Protocol = TCP)(Host=cprod-
maindb4.appprod.aws.calsaws.net)(Port=1521)))
(Connect_Data=(Service_Name = appco)))
```



2.2.2 CalSAWS Online Application

- Update the **datasource** configuration in **Weblogic Admin Console** with the AppCot database connection string that supports failover options. These configuration needs to be updated for all the clusters when deployed in PROD and lower environments.
- Update the database credentials and other related secret details in the AWS Secret Manager that will correspond to the new DB Service Name that supports automatic failover.

2.2.3 CalSAWS Batch and Batch Scheduler

- No impact on Batch Scheduler – Batch Scheduler does not connect to CalSAWS Primary DB directly.
- No impact on CalSAWS Batch – Continue to use existing DB connection string to connect CalSAWS Primary DB.

2.2.4 CalSAWS Event Streaming/Connectors

Event Streaming

- Update the **datasource url** entry in **batch.properties** with the AppCot database connection string that supports failover options.
- Business functionality within multiple functional areas will be reviewed and then batch jobs will be refactored. The batch jobs that can support restartability will be updated to use database connection strings that supports failover options.
- Batch that does not support restartability will be re-executed manually with Batch-Ops support after business team analyze potential impacts, perform database clean ups if required or take necessary steps as needed.

Connectors

- Update the respective environment [ca_connectors/environment-properties](#) **datasource connection.url** entry with the AppCot database connection string that supports failover options.
- Perform respective environment Jenkins job Deploy-Kafa-Connector/Deploy-Kafka-Connector-Cloud Deployment
- Connectors should have "running" status after database fails over from primary to secondary database.

2.2.5 CalSAWS Spring-Boot APIs

- Update the **spring.datasource.url** entry in **application.yml** with the AppCot database connection string that supports failover options.
- Update the database credentials and other related secret details in the AWS Secret Manager that will correspond to the new DB Service Name that supports automatic failover.

2.2.6 CalSAWS Analytics

For a HA solution in case of Primary DB failure we need to use Disaster Recovery (DR) Database as the secondary database for ingestions as Analytics uses Stand By database to avoid performance issues for other applications. To achieve this below are the steps to be followed considering connections to DR database is in place with EMR and Qlik Servers.

- Update the DB Connection details with AppCot connection string in Qlik by using Oracle Wallet for connections for primary and secondary database for On-Request Reports.
- Update the database credentials and other related secret details in the AWS Secret Manager that will correspond to the new DB Service Name that supports only secondary database to make sure that Analytics ingestions from EMR always use the secondary database.
- Secrets to be created for DR Database.

- In case of HA Scenario, Analytics Batch should be using DR database for ingestions to avoid affecting other applications.
- DR Database should be in sync before starting any ingestions, create an automation design for this to avoid any manual intervention. (Design Pending to be finalized).
- Ingestion jobs pointing to stand by will automatically fail.
- When any ingestion fails, the job will execute python code to check if the Database is primary or secondary.
- Then If the HA database is primary, python code will execute the command to check if the older primary has become secondary or not and if yes it will continue ingestion from there.
- If the HA database is primary and older primary is down, Python code will execute the commands to check if DR Database is in sync with primary or not and if it's in sync it will start ingestion from DR Database. (It will be checking primary/secondary check in case of failures and DR sync every 30 seconds in a loop).
- If the HA database is secondary, then it will continue to fail as this is not HA Scenario and will be a different error.

2.2.7 Child Care Portal

2.2.7.1 Update the Child Care Portal backend AWS Account Secrets Manager DB connections to set the "URL" with AppCot database connection string. Following property within AWS Secret Manager will be updated.

- secret/childcareservice/xxxx/oracle

2.2.7.2 Update the Child Care Portal backend lambda DB connections to utilize the Secrets Manager AppCot "URL" connection string value rather than the Host/Port/Name direct connection string.

- Lambda API Endpoints to be updated:
 - searchResults
 - getCaseDetails
 - referralSearchResults

2.2.8 IVR Connect

- Update the "connection" parameter in the common "environment.ts" file with the AppCot database connection string.
- Redeploy the updated "environment.ts" file as part of the "calsaws-typescript-env-lambda-layer" Lambda layer.
- Redeploy all IVR Lambdas to use the latest version of the "calsaws-typescript-env-lambda-layer" Lambda layer.
- Update the database credentials and other related secret details in AWS Secret Manager that will correspond to the AppCot DB Service Name that supports automatic failover.

2.2.9 IVR Predictive Handling Update Batch Job

- Update the database credentials and other related secret details in the AWS Secrets Manager that will correspond to the new DB Service Name that supports automatic failover.
- Update PH_UPDATE_WEIGHTS.sh to set up the database connection string from Secrets Manger values and pass that to the R script PH_Data_Merge_CallLog_CallQueue_Model.R
- Update PH_Data_Merge_CallLog_CallQueue_Model.R to accept the new database connection string for connecting to the database.

2.2.9 CalSAWS IIR – (Phonetic Search)

Setting up the HA database for IIR process consists of updating files on the IIR server as well as on the online server, and then deploying the updated properties after.

The following done on IIR server (AT-IIR for appcot) using AT2 secrets (online and iir passwords):

- Create a duplicate sdf for the new datasource in /u01/calsaws/InformaticaR/civ/. Check which environment's schema the new datasource will use. Copy over the sdf file and name it datasource.sdf (e.g. appcot.sdf) and replace all the datasource names (ie. From ch3saws to appcot). Then update the password on line 103 so it looks like ``odbc:99:iir/{iir_password}@{datasource_name}``.
- Add a line in /u01/calsaws/InformaticaR/civ/dbscripts/iir-creds for the datasource, ``{datasource_name}: {iir_password}``.
- Update /u01/oracle/product/12.1.0/network/admin/tnsnames.ora with the tns string with host IP and datasource name.
- Update /u01/calsaws/InformaticaR/bin/odbc.ini to have a block for that environment. Just copy an existing env block and add to the bottom, replacing the datasource name in 4 places in that block.
- If needed, update /u01/calsaws/InformaticaR/civ/dbscripts/get-db-creds-from-secret-manager.sh by adding an elif statement with correct secrets path if needed to override under ``# Nonstandard Env/DB Name Overrides``
- Run reindexing (should need first time only) - <https://wiki.calsaws.net/wiki/Manual-IIR-Reindexing>

In online server:

- Update all of the ids properties with the datasource name, iir password, and ids-host if needed in the properties.zip/architecture.properties on server and in the filter properties in bitbucket with the proper branch (can request this info from build and deploy team)
- Deploy properties and then restart Weblogic.

2.3 Security Updates

NA.

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-254796

Automated EBT Card Replacement

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Korey Edwards, Jared Kuester
	Reviewed By	Michael T. Wright, Darcy Alexander, Logan Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/09/2023	1.0	Initial Draft	Korey Edwards, Jared Kuester

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1 OVERVIEW

This robotic process automation (RPA) will allow customers to request an electronic benefits transfer (EBT) card replacement via interactive voice response (IVR). This document covers the IVR call flow in which customers will select the EBT replacement option, their method of delivery and the steps the RPA will take to complete this request within CalSAWS.

1.1 Current Design

There is no automated option to replace an EBT card in the IVR.

1.2 Requests

Add a self-service option in the Inbound IVR to request a replacement EBT card for all 58 counties.

1.3 Overview of Recommendations

1. Modify the County IVR call flows with the following additions:
 - a. Callers will have a new EBT Card replacement option
 - b. The IVR (via Amazon Connect) will check the county preferences to see if county has opted into EBT Card mail delivery and pickup
 - c. The IVR (via Amazon Connect) will check the request history to confirm the customer has not requested an EBT Card within the last 90 days
 - d. The customer selects the EBT Card delivery option:
 - i. Mail – The card is mailed to the customer's mailing address noted in CalSAWS.
 - ii. Pickup – The card is available to be printed at a district office nearest to the customer's location on file.
 - e. The IVR (via Amazon Connect) relays the customer request details (listed) to the RPA.
 - i. Case Id
 - ii. Delivery Method
2. RPA receives the request and reissues the card within CalSAWS.

Commented [KE1]: "an EBT Card"

Commented [KE2]: nearest to the customer's on file location

1.4 Assumptions

1. No core CalSAWS application changes are required. The RPA interacts with the CalSAWS front end webpage.
2. EBT card replacements will be issued for the primary account holder.
3. EBT card replacements can only be requested by the primary applicant on the case
4. The RPA uses the customer's current name and address within CalSAWS to mail the request or determine the nearest office for pick up. Any changes will require speaking to an agent.
 - a. There is an option in the IVR to verify if the customer's name or address has changed.

5. The customer authentication process will not change.
6. The global case self-service options will be updated to include EBT Replacement
7. Individual County pick up option will be deployed based on the county response to CRFI 23-086.
8. Individual County EBT Transfer for multiple requests will be deployed based on the county response to CRFI 23-086.
9. This change will not include any reporting
10. BIC automated replacement functionality is not part of this SCR
11. The process is the same for all counties. When the reissue button is pressed and the page is saved, a real time Host to Host transaction is sent to the EBT vendor Fidelity Information Services (FIS) to add a new EBT card for the same client. FIS cancels the previous card and issues a new card and sends a success response to CalSAWS with the new EBT card number. When the success response is received by CalSAWS, the previous card is canceled in CalSAWS and the new card (received in the response message) is added in the CalSAWS database. All this happens real-time.
12. A separate SCR will be created for each Contact Center County deployment.
13. Anytime a caller is transferred to the EBT line, they are transferred to +1 877-328-9677.

Commented [AH3]: Move this later in the design doc

Commented [AH4R3]: This is addressed later in the design document.

Commented [AH5]: Move this later in the design doc

Commented [AH6R5]: This is addressed later in the design document.

2 RECOMMENDATIONS

2.1 IVR Application

2.1.1 Overview

Update the County IVR Call Flows to include the option to request a replacement EBT Card. That option will send the customer to a new contact flow that will ask the customer some follow up questions and submit the request to replace the EBT through the RPA solution.

2.1.2 Description of Changes

1. Modify the Case Self Service Page
 - a. Add the Self-Service Option to request an EBT Card replacement. In the IVR, the customer will hear:

“To hear current benefits information, press 1. To request a copy of a form or your verification of benefits, press 2. To check the status of a document requested or submitted, press 3. To request a replacement EBT, press 4. To change your IVR PIN, press 5. To speak to an eligibility worker, press 6. To hear these choices again, press 7.”

- b. When the customer selects 4, send them to the new "EBT Card" Flow.
- 2. Create a new table called "EBT Card Delivery Options" in a central account that stores information about the county preferences for whether EBT Card pick up will be available through the automated RPA system.

Property	Value
countyCode	<countyCode>
pickUp	"Yes" or "No"

Commented [AH7]: Type column was removed

- 3. Create a new table "EBT Card Request History" in a central account that stored EBT Card requests from the last 90 days.

Property	Value
personId	<personId>
requestDate	<Date of EBT Card Replacement Request>

Commented [HA8]: Type column was removed

- 4. Query the "EBT Card Delivery Options" table to determine the county-specific preference for pick up requests. Based off the county preferences, pick up requests will either be:
 - a. Automated within the IVR
 - b. Transferred to speak to a worker.
- 5. Query the "EBT Card Request History" table to check if the customer has requested an EBT card within the last 90 days
 - a. If the customer has not requested an EBT card within the last 90 days, continue to step 6.
 - b. If the customer has requested an EBT card within the last 90 days, they will be transferred to speak to a worker based on the county preference. They will either be:
 - i. Transferred to the EBT line (877-328-9677)
 - ii. Transferred to a county worker:
 - 1. In a Contact Center county, the customer will be transferred to the queue that corresponds with their exit reason flow. For most counties, this will be their CalFresh Queue
 - 2. In a Non-Contact Center county, the customer will be transferred to their case worker.
 - The customer will be routed to their CalWORKs worker if they are active. In the

case they are not active, they will be transferred to their CalFresh worker.

6. The customer will hear the following prompts:
 - "To request a new EBT card, you will need to confirm a couple questions."**
 - "If your name is the same as it appears on your EBT card, press 1. If your name is different, press 2. To hear these choices again, press 7."**
 - a. If the customer selects option 1, continue to step 7.
 - b. If the customer selects option 2, they will be transferred to speak to a county worker.
 - c. If the customer makes no selection or makes an invalid selection, they will hear the prompt menu twice and then will be transferred to the General queue or to the county equivalent. Callers in Non-CSC counties will be sent to the direct EBT line.
7. The customer will hear the following prompt:
 - "If your mailing address is the same, press 1. If your mailing address has recently changed, press 2. If you do not have a mailing address or do not have a permanent address, press 3. To hear these choices again, press 7."**
 - i. If the customer selects option 1, continue to step 8.
 - ii. If the customer selects option 2, they will be transferred to speak to a county worker. Callers in Non-CSC counties will be sent to the direct EBT line.
 - iii. If the customer selects option 3 and the customer is in a county where pick up requests can be placed via the automated system, then continue to step 8. Otherwise, they will be transferred to speak to a county worker.
 - iv. If the Customer makes no selection or makes an invalid selection, they will hear the prompt menu twice and then will be transferred to the General queue or the county equivalent. Callers in Non-CSC counties will be sent to the direct EBT line.
8. The customer will hear the following prompt:
 - "If you want your new EBT card mailed to your address on file, press 1. If you want to pick up your new EBT card at your local district office, press 2. To hear these choices again, press 7."**
 - i. If the customer selects option 1, record the delivery selection as mail delivery and continue to step 10.
 - ii. If the customer selects option 2, check the county preference for pick up.
 1. If the county preference is to automate pick up requests in the IVR, record the delivery selection as pickup and continue to step 10. Note, when customers select pick up as their delivery preference in the IVR, the card is queued to be printed at the customer's nearest district office.

Commented [AH9]: Non-CSC - Identify where Non-CSC are routed

Commented [AH10]: Non-CSC - Identify where Non-CSC are routed

Commented [HA11]: Addressing CRFI concerns regarding pick up

- The nearest district office is based on the customer's location on file in CalSAWS.
2. If the county preference is to transfer pick up requests to a worker, continue to step 9.
 - iii. If the Customer makes no selection or makes an invalid selection, they will hear the prompt menu twice and then will be transferred to the General queue or the county equivalent. Callers in Non-CSC counties will be sent to the direct EBT line.
9. If the caller has chosen "Pick up" and the county has chosen to transfer pick up requests to a worker, the following routing logic will be followed:
- a. In a Contact Center county, the customer will be transferred to the queue that corresponds with their exit reason flow.
 - i. Note: For most counties, this will be their CalFresh Queue
 - b. In a Non-Contact Center county, the customer will be transferred to their case worker.
 - i. The customer will be routed to their CalWORKs worker if they are active.
 - ii. In the case they are not active, they will be transferred to their CalFresh worker.
10. The automated EBT replacement request will be placed. The following information will be sent to the RPA to place the request.

Commented [AH12]: Non-CSC - Identify where Non-CSC are routed

Property	Value
Queue	Dev: EBTReplacementProcess_AZ_Connect UAT: EBTReplacementProcess_AZ_Connect Production: EBTReplacementProcess
Priority	Normal
Defer Date	<Time of request>
DueDate	<Time of request plus 24 hours>
Reference	{{Guid}}_CaseNumber
Case Number	<Case Number>
EBT Replacement	Y
Replacement Type	"Pickup" or "Mail"
Status	Pending

11. If the request was successful, the request will be logged in the "EBT Card Request History" table. The customer will hear one of the following prompts, depending on their delivery choice:

Mail - **"Thank you. Your EBT card replacement request has been received. Please allow two to three business days for it to be sent to your address on file."**

Pick up - **"Thank you. Your EBT card replacement request has been received. Please allow 2 hours for processing for pickup."**

12. If the request is not successful, the customer will hear the following prompt:

"We're sorry, we are unable to process your request at this time"

The customer will be sent to the General Queue or the county equivalent. Callers in Non-CSC counties will be sent to the direct EBT line.

Commented [AH13]: Non-CSC - Identify where Non-CSC are routed

For more information see the attached document "CA-254796 – Automated EBT Card Replacement Call Flow".

2.2 Robotic Process Automation

2.2.1 Overview

Implement the RPA to process the EBT replacement card requests from the Inbound IVR. The RPA will automatically navigate CalSAWS and reissue a card using the existing process in the application.

2.2.2 Robotic Process Automation Mockup

Please refer to the screenshots in Section 2.2.3 for the Robotic Process Automation Mockup.

2.2.3 Description of Changes

The RPA will take the following steps when the IVR requests an EBT Card replacement:

1. Access CalSAWS - <https://web.calsaws.net/c-iv/utilities/Homepage/view>.



Figure 2.2.3.1 – CalSAWS Login Screen

2. Enter the RPA Account username.

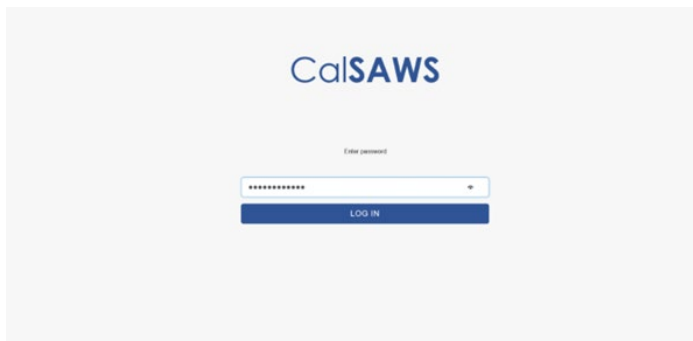


Figure 2.2.3.2 – CalSAWS Password Screen

3. Click the "Log In" button.
 - a. See Figure 2.2.3.2 above
4. Enter the RPA Account Password.
5. Click the "Log In" button.
 - a. See Figure 2.2.3.2 above
6. Click on the Accept button on the CalSAWS Security Screen.

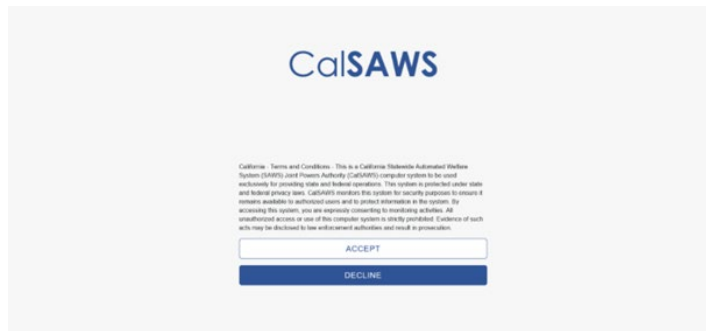


Figure 2.2.3.3 – CalSAWS Security Screen

7. Click on Case Number Field on the CalSAWS Home Page.

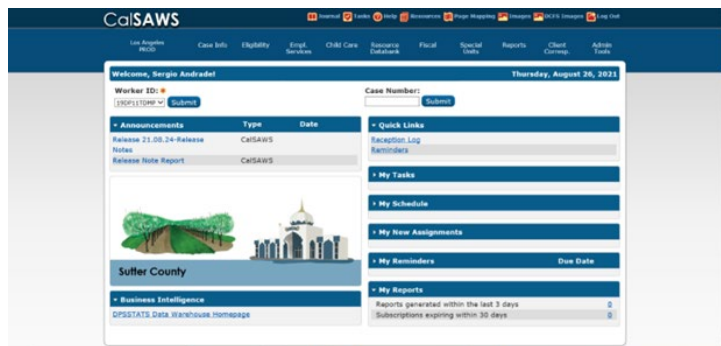


Figure 2.2.3.4 – CalSAWS Home Page

8. Enter Case Number.
 - a. See Figure 2.2.3.4 above
9. Click "Submit" button.
 - a. See Figure 2.2.3.4 above
10. Click on "EBT Account List" on the CalSAWS Case Summary Page.

The screenshot shows the CalSAWS Case Summary page. The sidebar on the left contains a list of navigation options, with 'EBT Account List' highlighted in red. The main content area is titled 'Case Summary' and includes a search bar for Case Name and County (Los Angeles). Below this are sections for Companion Cases, e-Applications, Display options (set to 10/01/2021), and expandable sections for Case Flags, CalWORKs, and CalFresh.

Figure 2.2.3.5 – CalSAWS Case Summary Page

11. Click on Account number hyperlink on the EBT Account List Page.

The screenshot shows the CalSAWS EBT Account List page. The sidebar on the left has 'EBT Account List' selected. The main content area is titled 'EBT Account List' and contains a table with the following data:

Account Number	Primary Cardholder	Cash Status	CalFresh Status	Begin Date	End Date
XXXXXXXXXX	[Redacted]	Active	Active	11/20/2015	

The 'Account Number' 'XXXXXXXXXX' is highlighted with a red box. Below the table, there is a message: 'This Type_1 page took 0.89 seconds to load.'

Figure 2.2.3.6 – CalSAWS EBT Account List Page

12. Click on Card Number hyperlink on the EBT Account Details Page.

Case Summary

Case Number: **Go**

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Negative Action

New Program

New Person

Hide Person

EBT Account List

EBT Repayment List

EBT Card Transaction Search

Issuance History

Expungement History

Child Support Collections

Time Limit Aid Summary

EBT Account Detail

Add Card **Close**

Account Number: **Begin Date:** 11/20/2015 **End Date:**

Card Holder: * **Card Access Type:** * Cash & CalFresh **Card Status:** Issued

Cash

Status: Active **Balance:** \$30.01

CalFresh

Status: Active **Balance:** \$12.57

▶ **EBT Account History**

Current Cards

Name	Recipient Type	Card Number	Access Type	Status
<input type="text"/>	Primary	XXXXXXXXXXXX	Cash & CalFresh	Issued

Figure 2.2.3.7 – CalSAWS EBT Account Detail Page

13. Click the Reissue Button on the EBT Card Detail Page. At this point, the EBT card will be queued in a batch for mailing to the customer's address on file or pick up delivery at the district office nearest to the customer's location on file.

Commented [HA14]: Addressing CRFI concerns regarding pick up location.

Case Summary

Case Number: **Go**

Person Search

EBT Account Search

EBT Card Detail

* - Indicates required fields

Reissue **Edit** **Close**

Card Number: **Account Number:**

Card Information

Figure 2.2.3.8 – CalSAWS EBT Card Detail Page

14. Next the RPA will create a journal entry. Click the Journal tab in CalSAWS.

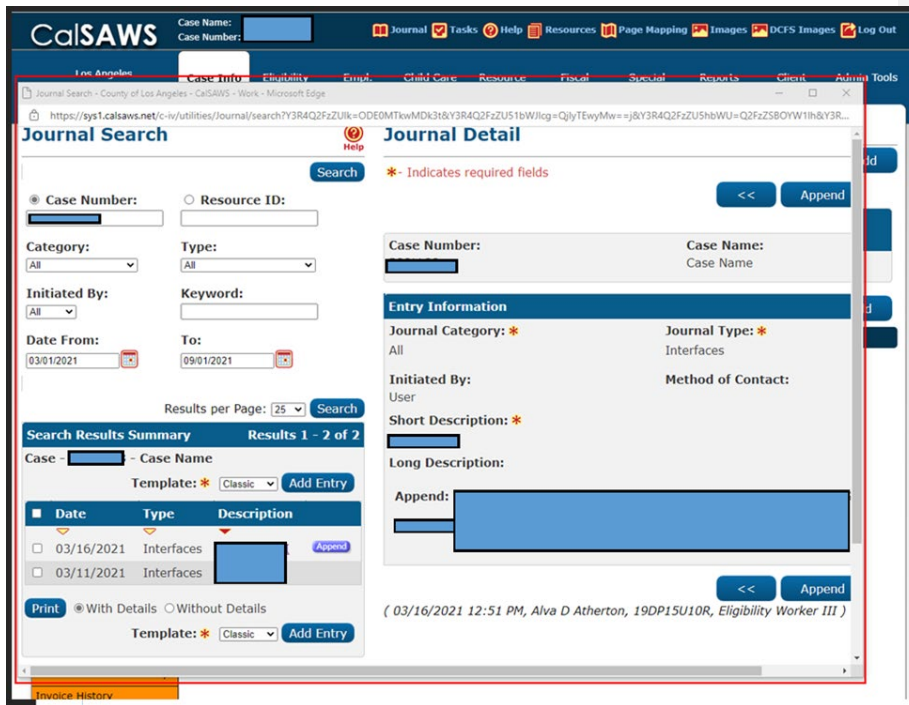


Figure 2.2.3.9 – CalSAWS Journal Detail Page

15. Click Add Entry on the Journal Detail Page.
 - a. See Figure 2.2.3.9 above
16. Populate Journal Entry details.

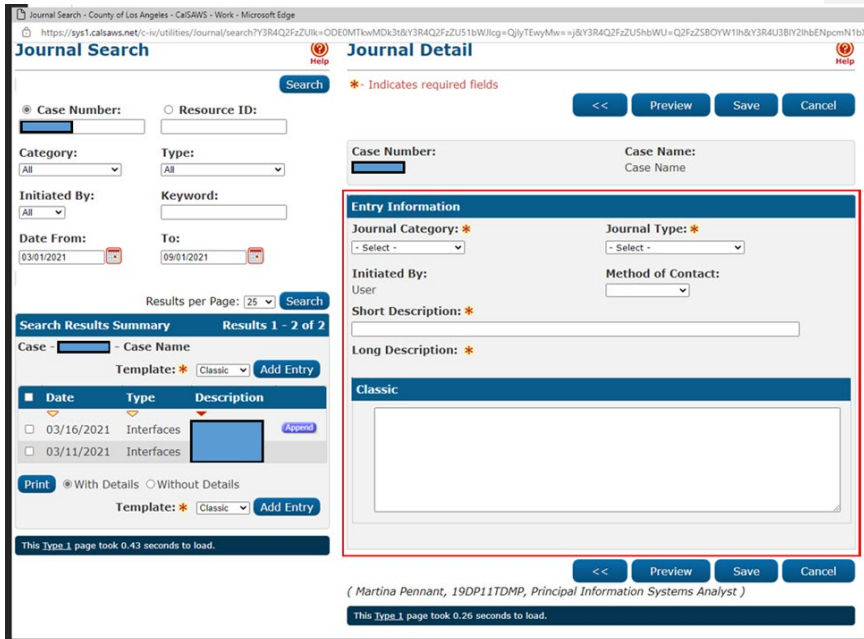


Figure 2.2.3.10 – CalSAWS Journal Entry Information Page

17. Click Save on Journal Entry. A journal entry will be created.

Entry Information

Journal Category: *
Eligibility

Journal Type: *
Batch EDBC

Initiated By:
User

Method of Contact:
Contact Center

Short Description: *
EBT Replacement

Long Description: *

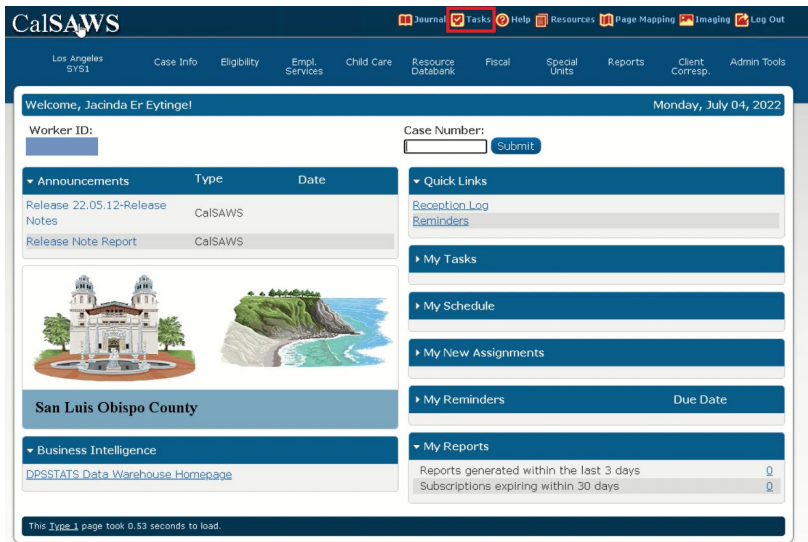
Customer authenticated on IVR. EBT Replacement Card requested and issued via mail. Transaction completed by BOT. |

Figure 2.2.3.11 – CalSAWS Journal Detail Page

If there is a failure at any point in the process of re-issuing a card and creating a journal entry, an exception task will be created following the steps below.

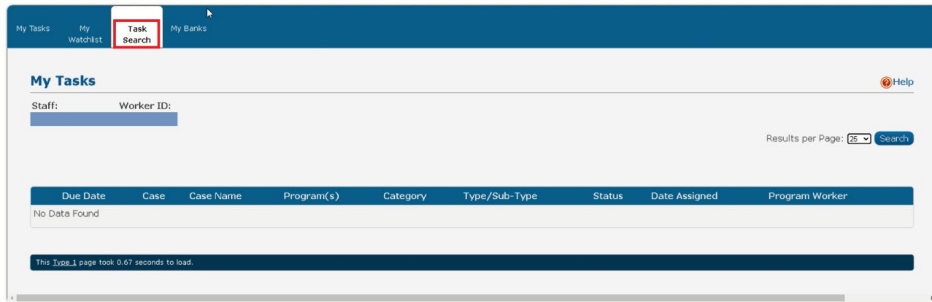
1. Click on the 'Tasks' tab on the CalSAWS home page.

Figure 2.2.3.12 – CalSAWS Home Page



2. Click on 'Task Search' on the My Tasks page.

Figure 2.2.3.13 – CalSAWS My Tasks Page



3. Click on 'Add Task' on the Task Search page.


Figure 2.2.3.13 – CalSAWS Tasks Search Page

4. Populate case details and exception reason on the Task Details page. Click Save and Return to submit the task.

Figure 2.2.3.14 – CalSAWS Task Details page

3 SUPPORTING DOCUMENTS

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

1	IVR Application	Call Flow Updates to county inbound IVR	 CA-254796 - Automated EBT Card

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-266891

Update CW/CF RE Appointment Batch Jobs
(PBXXC907 & PBXXC908)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu
	Reviewed By	Edgars Reinholds, Chitra Barsagade, Himanshu Jain, Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/31/2023	1.0	Initial draft	Shining Liu

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1 OVERVIEW

Updates are needed to the regular CW/CF (CalWORKs/CalFresh) RE Appointment batch job (PBXXC907) implemented by CA-216551 and last updated by CA-226701, and the flexible CW/CF RE Appointment batch job (PBXXC908) implemented by CA-226701.

1.1 Current Design

When checking whether a valid phone number exists, both the regular and flexible CW/CF RE Appointment batch jobs currently evaluate the phone number of the program Payee. Appointments are scheduled for the program Payee.

Both batch jobs check for a valid phone number before checking if the worker's Daily Threshold has been set up. If an invalid phone number is found, a task is generated. If a valid phone number is found and the worker's Daily Threshold has not been set up, a task is not generated.

1.2 Requests

1. Update both the regular and flexible CW/CF RE Appointment batch jobs so that:
 - a. The valid phone number check evaluates the phone number of the Primary Applicant instead of the Payee.
 - b. Appointments scheduled by batch are scheduled for the Primary Applicant instead of the Payee.
 - c. No task is created as long as the Daily Threshold on the Position Detail page has not been set up for the worker, even if the customer has an invalid phone number.

1.3 Overview of Recommendations

1. Update both the regular and flexible CW/CF RE Appointment batch jobs so that:
 - a. The valid phone number check evaluates the phone number of the Primary Applicant instead of the Payee.
 - b. Appointments scheduled by batch are scheduled for the Primary Applicant instead of the Payee.
 - c. No task is created as long as the Daily Threshold on the Position Detail page has not been set up for the worker, even if the customer has an invalid phone number.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. If the worker assigned to CW is different from the worker assigned to CF on a combination CW/CF case, the appointment is scheduled with the worker assigned to CW.

3. Appointments not scheduled by either batch job should appear in 'Redetermination – Final Exception Report', which is generated after both batch jobs complete, for the following reasons:
 - a. No time slots available
 - b. Worker has a Daily Threshold of "0" or blank
 - c. Appointment already scheduled in RE Due Month
 - d. Invalid phone number
4. These changes do not affect LA's Recertification Appointment Batch jobs (PB19C902 and PB19C909).
5. When the GEN 102 populates the phone number of the customer, the phone number belongs to the Primary Applicant.

2 RECOMMENDATIONS

2.1 Update regular and flexible CW/CF RE Appointment batch jobs

2.1.1 Overview

Update PBXXC907 and PBXXC908 so that the valid phone number check evaluates the phone number of the Primary Applicant instead of the Payee. Additionally, appointments created by either batch job should be scheduled for the Primary Applicant instead of the Payee. Additionally, no task should be created for an invalid phone number if the worker's Daily Threshold has not been set up.

2.1.2 Description of Change

1. Update the valid phone number check so it evaluates the phone number of the Primary Applicant instead of the Payee.
 - a. For CW and combo CW/CF cases, evaluate the phone number of the CW Primary Applicant.
 - b. For CF, evaluate the phone number of the CF Primary Applicant.
2. Update the valid phone number check so that any number containing only the same digit is considered invalid.
 - a. The phone number is only determined to be valid if the Type is Main, Home, or Cell and the value is not blank, empty, null, or a series of the same repeated digit (i.e. (000) 000-0000, (111) 111-1111... (999) 999-9999).
3. Schedule appointments for the Primary Applicant instead of the Payee.
 - a. For CW and combo CW/CF cases, schedule appointments for the CW Primary Applicant.
 - b. For CF, schedule appointments for the CF Primary Applicant.
4. Swap the order of the valid phone number check and the Daily Threshold check. First check the worker's Daily Threshold – if it is "0" or blank, do not create a task, and populate the 'Redetermination – Final Exception Report' with the existing reason "Daily Threshold has not been set up on Position Detail page." If the worker's Daily Threshold has been set up, then check for a valid phone number – if the phone number is invalid, create a task, and populate the 'Redetermination – Final Exception Report' with the existing reason "No valid phone number for customer found. Appointment not scheduled."
 - a. No task should be created as long as the Daily Threshold on the Position Detail page has not been set up for the worker, even if the customer has an invalid phone number.

2.1.3 Execution Frequency

No change. 5th business day of the month.

2.1.4 Key Scheduling Dependencies

No change. Both batch jobs must complete before 'Redetermination – Final Exception Report' runs.

2.1.5 Counties Impacted

Migration Counties

2.1.6 Category

No change. Core.

2.1.7 Data Volume/Performance

N/A

2.1.8 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.)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.13.2.2	The LRS shall set appointments for cases requiring Redetermination and/or Recertification, based on program rules.	Update RE appointment batch jobs for Migration Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-267216

Enhance Qlik Dashboards to Improve
Performance

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Russ Golden
	Reviewed By	Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/6/23	1.0	Creation	Russ Golden
10/2/23	1.1	Added report locations, expanded description of figures and record flag	Russ Golden

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1 OVERVIEW

This is a redesign of poorly performing Qlik Sense dashboards and associated dashboard objects. The goal is to improve the useability of the applications, while also improving the end user experience and overall performance.

1.1 Current Design

A user may navigate to a Qlik Sense sheet from any page in a dashboard, with or without any filters selected, and view tables and other objects. These objects do not currently have any limits in place to reduce the CPU and memory consumption, nor limit the number of records generated in the visible object. Users must navigate back to summary sheets to select additional filters, then navigate back to the objects to view the results of the filtering. Records beyond 1 million cannot be exported to excel and will be truncated on export (a limitation of excel).

1.2 Requests

Modify the dashboards to allow the user to make changes without navigating back and forth between sheets. Reduce the memory consumption of the dashboards and improve the loading speed for tables and similar objects in large applications.

1.3 Overview of Recommendations

1. Modifications to the dashboards should include the ability for the user to make quick changes to their selections without navigating back and forth between sheets. The addition of filter panes with relevant filter fields to each affected table object will address this issue.
2. Modifying the table to limit the maximum number of records calculated and displayed will have multiple positive results:
 - a. The page will load much more quickly for the end user.
 - b. The memory consumption of the application will drop considerably.
 - c. Users will no longer be able to unknowingly export truncated excel documents when attempting to export more than a million records.

Note: This feature has already been enabled in some dashboards as part of a previous design change (Caseload History). This would expand the feature to additional poorly performing tables in high volume reports.
3. Modifying the table to include the flags on which it is filtered directly to the table itself, instead of relying on the filters. This is preferable to attempting to load filters after the table has rendered in full, through sheet actions.

1.4 Assumptions

1. There is a relevant ID field available for each table to calculate a maximum displayed record count.
2. There are no sheet actions prohibiting the use of additional filters.

3. Tables can be modified with appropriate IDs to enable the functionality where needed.

2 RECOMMENDATIONS

2.1 Dashboard and Table Modifications

2.1.1 Report Locations

1. **Semi Annual Reporting Admin (SAR) Dashboard**
 - a. **Global:** Reports
 - b. **Local:** Business Intelligence
 - c. **Task:** Statistical Summary Analysis
2. **Medi-Cal Dashboard**
 - a. **Global:** Reports
 - b. **Local:** Business Intelligence
 - c. **Task:** DPSSTATS
3. **Task Management Dashboard**
 - a. **Global:** Reports
 - b. **Local:** Business Intelligence
 - c. **Task:** Real Time Task Management
4. **Caseload History**
 - a. **Global:** Reports
 - b. **Local:** Business Intelligence
 - c. **Task:** DPSSTATS

2.1.2 Affected Tables

1. **Semi Annual Reporting Admin (SAR) Dashboard** affected tables:
 - a. Worker Case List
 - b. Worker Case List – Received
 - c. Worker Case List - NA 960
 - d. Discontinued Cases by Discontinued Reason - Detailed Case List
2. **Medi-Cal Dashboard** affected tables:
 - a. # Medi-Cal Applications Processed
 - b. % Medi-Cal Applications Approved
 - c. # Medi-Cal Non-DDSD Applications Processed
 - d. % Medi-Cal Non-DDSD Applications Processed within 45 Days
 - e. # Medi-Cal Applications Pending by Length of Time
 - f. # Medi-Cal Non-DDSD Applications Received
 - g. Case List 174 - Applications Received
 - h. % Medi-Cal Applications Processed within 45 Days
 - i. # Medi-Cal Applications Denied
 - j. % Medi-Cal Applications Denied
 - k. 187 Drill down Recertifications
 - l. 193 Drill down Recertifications
 - m. 192 Drill down Recertifications
 - n. % Resulting in Ongoing Eligibility
 - o. Applications Received - Case List

- p. # Newly Approved Medi-Cal Participants by Number of Days Since Last Termination
- q. # Medi-Cal Approvals with and without Prior Termination History by Termination Reason
- r. Case List 112
- s. Case List 265
- t. Case List 140
- u. % Medi-Cal Applications Received by Source Case List
- v. # Medi-Cal Applications Received by Source Case List
- w. # Offices by % of Full-Scope MAO Cases w/ CalFresh

3. Task Management Dashboard affected tables:

- a. # Open Tasks by Category
- b. # Completed Tasks by Category - Report 388 - Historical Task Management Productivity
- c. # Completed Tasks by Category - Historical Task Management
- d. # Open Tasks vs # Workers - Task List
- e. # Open Tasks vs # Workers - Worker List
- f. # Completed Tasks by Category - Historical Task Management
- g. # Open Tasks by Category - Report 387 - Historical Task Productivity
- h. # Overdue Tasks - Report 386 - Historical Task Management Productivity
- i. # Open Tasks by Category - Report 301 - Real Time Task Management
- j. # Completed Tasks During Current Day by Division
- k. # Open Tasks by Category - Report 383 - Real Time Task Productivity
- l. # Completed Tasks During Current Day by Category - Report 303 - Real Time Task Management
- m. # Completed Tasks During Current Day by Category - Report 382 - Real Time Task Productivity
- n. # Overdue Tasks - Report 381 - Real Time Task Management Productivity
- o. # Overdue Tasks - Report 305 - Real Time Task Management

4. Caseload History affected tables:

- a. # Applications Pending by Length of Time
- b. # Redeterminations Completed
- c. # Active Caseload
- d. Active Caseload Case List

2.1.3 Example Mockup - Semi Annual Reporting Admin (SAR) Dashboard

CalSAWS Worker Case List

Submit Month* Office Region Unit County Worker Generate Type Cases Report Type

Figure 2.1.2.1 – New data filter pane

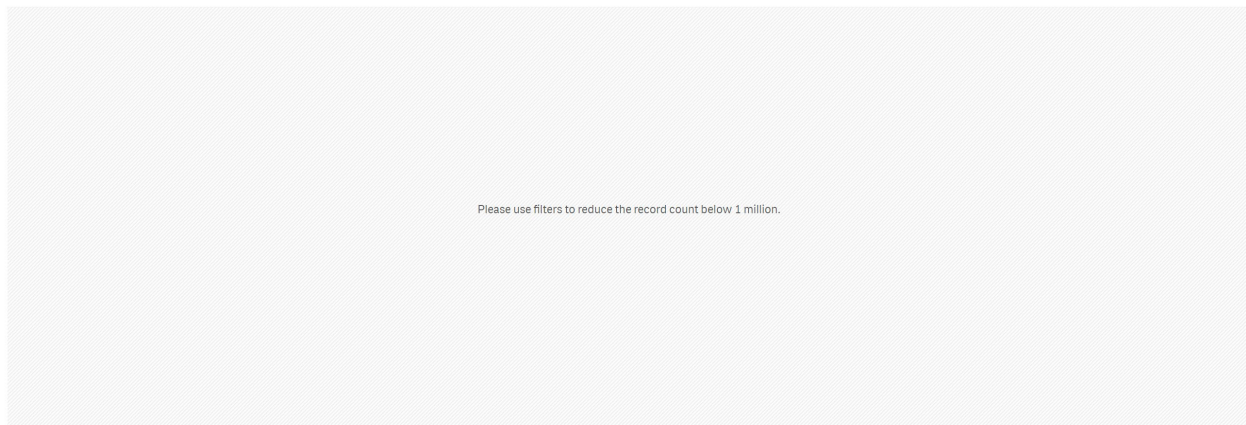
CalSAWS Worker Case List

Submit Month* Office Region Unit County Worker Generate Type Cases Report Type

Case Number	Case Name	Office	Unit	Assigned Worker	Actioned Worker	Program Type	Report Type	Generate Type
BBB3F52	Case Name	10-010 Wilshire Special Office	DP-TD-CW Approved	19DP10TD0B	19DP10TD0B	Medi-Cal	MAGI RE Packet	Hold For Pick
BBB3Q94	Case Name	40-040 Norwalk	DP-4G-	19DP404G0D	19DP404G0D	Medi-Cal	Mixed Household RE Packet	Hold For Pick
BBB3V46	Case Name	32-032 San Fernando Branch	DP-K3-FSO	19DP32K30B	19DP32K30B	Medi-Cal	MAGI RE Packet	Hold For Pick
BBB7W62	Case Name	10-010 Wilshire Special Office	DP-Q2-NSA1	19DP10Q202	19DP10Q202	Medi-Cal	MAGI RE Packet	Hold For Pick
BBB8X16	Case Name	11-011 East Valley	DP-3P-MC APPROVED	19DP113P12	19DP118AQ	CalWORKs	Controlled Forms	Printing Error
BBB8X27	Case Name	36-036 Pomona	DP-4U-3UE	19DP364U00	19DP364U00	Medi-Cal	MAGI RE Packet	Hold For Pick
BBB291	Case Name	08-008 Southwest Special	DP-A1-	19DP08A105	19DP08A105	Medi-Cal	MAGI RE Packet	Hold For Pick
BBB1520	Case Name	82-082 West Valley	DP-6Y-	19DP826Y0B	19DP826Y0B	Medi-Cal	MAGI RE Packet	Hold For Pick
BBB8Y88	Case Name	32-032 San Fernando Branch	DP-K3-FSO	19DP32K30B	19DP32K30B	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBCJ87	Case Name	17-017 Florence	DP-61-	19DP176106	19DP176106	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBF52	Case Name	70-070 Metro Special Office	DP-6E-CALFRESH Approved	19DP706E0N	19DP706E0N	Medi-Cal	MAGI RE Packet	Printed Centre
BBBFW88	Case Name	07-007 South Special	DP-14-	19DP071402	19DP071402	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBF249	Case Name	14-014 Civic Center	DP-BS-Cal-Fresh Intake	19DP14BS01	19DP14BS01	Medi-Cal	MAGI RE Packet	Printed Centre
BBBG006	Case Name	15-015 Metro East	DP-4C-	19DP154C0E	19DP154C0E	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBG504	Case Name	20-020 San Gabriel Valley	DP-72-4AA	19DP207203	19DP207203	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBR73	Case Name	67-067 Lancaster General Relief Office	DP-A1-	19DP67A104	19DP67A104	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBH291	Case Name	36-036 Pomona	DP-9E-4US	19DP369E00	19DP369E00	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBJ330	Case Name	36-036 Pomona	DP-4U-3UE	19DP364U00	19DP364U00	Medi-Cal	Non-MAGI RE Packet	Hold For Pick
BBBJ93	Case Name	08-008 Southwest Special	DP-CW-900	19DP08CW0E	19DP08CW0E	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBJ982	Case Name	07-007 South Special	DP-14-	19DP07144T	19DP07144T	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBK067	Case Name	36-036 Pomona	DP-4U-3UE	19DP364U00	19DP364U00	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBKY76	Case Name	70-070 Metro Special Office	DP-5V-Head-5V	19DP705V0F	19DP705V0F	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBM602	Case Name	60-060 Rancho Park	DP-1X-	19DP601X0D	19DP601X0D	Medi-Cal	MAGI RE Packet	Hold For Pick
BBBM720	Case Name	07-007 South Special	DP-1E-MTC	19DP071E01	19DP071E01	Medi-Cal	MAGI RE Packet	Hold For Pick

Return

Figure 2.1.2.2 – Combined view, filtered (test data, masked)



Return

Figure 2.1.2.3 – Data volume limit message

CalSAWS Worker Case List - Original

Case Number	Case Name	Office	Unit	Assigned Worker	Actioned Worker	Program Type	Report Type	Generate Type
B083F52	Case Name	10-010 Wishire Special Office	DP-TD-CW Approved	19DP10TD00B	19DP10TD00B	Medi-Cal	MAGI RE Packet	Hold For Pickup
B083V94	Case Name	40-040 Norwalk	DP-4G-	19DP404G00D	19DP404G00D	Medi-Cal	Mixed Household RE Packet	Hold For Pickup
B083V46	Case Name	32-032 San Fernando Branch	DP-K3-FSO	19DP32K300B	19DP32K300B	Medi-Cal	MAGI RE Packet	Hold For Pickup
B087W62	Case Name	10-010 Wishire Special Office	DP-Q2-NSA1	19DP10Q202	19DP10Q202	Medi-Cal	MAGI RE Packet	Hold For Pickup
B088X16	Case Name	11-011 East Valley	DP-3P-MC APPROVED	19DP113P12	19DP110A0Q	CalWORKs	Controlled Forms	Printing Error
B088X27	Case Name	36-036 Pomona	DP-4U-3UE	19DP364U000	19DP364U000	Medi-Cal	MAGI RE Packet	Hold For Pickup
B089Z91	Case Name	08-008 Southwest Special	DP-A1-	19DP08A105	19DP08A105	Medi-Cal	MAGI RE Packet	Hold For Pickup
B091520	Case Name	82-082 West Valley	DP-6Y-	19DP826Y00B	19DP826Y00B	Medi-Cal	MAGI RE Packet	Hold For Pickup
B089Y88	Case Name	32-032 San Fernando Branch	DP-K3-FSO	19DP32K300B	19DP32K300B	Medi-Cal	MAGI RE Packet	Hold For Pickup
B08CJ87	Case Name	17-017 Florence	DP-61-	19DP176106	19DP176106	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09FD52	Case Name	70-070 Metro Special Office	DP-6E-CALFRESH Approved	19DP706E0N	19DP706E0N	Medi-Cal	MAGI RE Packet	Printed Centr
B09FW88	Case Name	07-007 South Special	DP-14-	19DP071402	19DP071402	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09FZ49	Case Name	14-014 Civic Center	DP-BS-Cal-Fresh Intake	19DP14BS01	19DP14BS01	Medi-Cal	MAGI RE Packet	Printed Centr
B09G006	Case Name	15-015 Metro East	DP-4C-	19DP154C0E	19DP154C0E	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09G504	Case Name	20-020 San Gabriel Valley	DP-72-4AA	19DP207203	19DP207203	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09GR73	Case Name	07-007 Lancaster General Relief Office	DP-A1-	19DP07A104	19DP07A104	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09HZ91	Case Name	36-036 Pomona	DP-9I-4US	19DP369I00	19DP369I00	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09J330	Case Name	36-036 Pomona	DP-4U-3UE	19DP364U000	19DP364U000	Medi-Cal	Non-MAGI RE Packet	Hold For Pickup
B09J939	Case Name	08-008 Southwest Special	DP-CW-900	19DP08CW0E	19DP08CW0E	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09JY82	Case Name	07-007 South Special	DP-14-	19DP07144T	19DP07144T	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09K007	Case Name	36-036 Pomona	DP-4U-3UE	19DP364U000	19DP364U000	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09KY76	Case Name	70-070 Metro Special Office	DP-5V-Head - 5V	19DP705V0F	19DP705V0F	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09M602	Case Name	60-060 Rancho Park	DP-1X-	19DP601X0D	19DP601X0D	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09MK70	Case Name	07-007 South Special	DP-OE-MCE	19DP070E01	19DP070E01	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09N551	Case Name	36-036 Pomona	DP-4Q-CASHER	19DP364Q00	19DP364Q00	Medi-Cal	MAGI RE Packet	Hold For Pickup
B09NVE9	Case Name	14-014 Civic Center	DP-BS-Cal-Fresh Intake	19DP14BS01	19DP14BS01	Medi-Cal	MAGI RE Packet	Printed Centr

Figure 2.1.2.4 – Original view (no filter available)

Generate Type	Submit Date	Current Status	Current Status Table Flag
Hold For Pickup	07/01/2023	Sent	1
Hold For Pickup	04/01/2023	Sent	1

Figure 2.1.2.5 – Additional Flag Field Example (Current Status Table Flag)

CalSAWS Worker Case List - Original

Unit	Assigned Worker	Actioned Worker	Program Type	Report Type	Generate Type	Submit Date
DP-TD-CW Approved	19DP10TD00B	19DP10TD00B	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-4G-	19DP404G00D	19DP404G00D	Medi-Cal	Mixed Household RE Packet	Hold For Pickup	04/01/2023
DP-K3-FSO	19DP32K300B	19DP32K300B	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-Q2-NSA1	19DP10Q202	19DP10Q202	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-3P-MC APPROVED	19DP113P12	19DP110A0Q	CalWORKs	Controlled Forms	Printing Error	11/12/2022
DP-4U-3UE	19DP364U000	19DP364U000	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-A1-	19DP08A105	19DP08A105	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-6Y-	19DP826Y00B	19DP826Y00B	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023
DP-K3-FSO	19DP32K300B	19DP32K300B	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-61-	19DP176106	19DP176106	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023
DP-6E-CALFRESH Approved	19DP706E0N	19DP706E0N	Medi-Cal	MAGI RE Packet	Printed Centrally	12/01/2018
DP-14-	19DP071402	19DP071402	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-BS-Cal-Fresh Intake	19DP14BS01	19DP14BS01	Medi-Cal	MAGI RE Packet	Printed Centrally	11/01/2019
DP-4C-	19DP154C0E	19DP154C0E	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023
DP-72-4AA	19DP207203	19DP207203	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023
DP-A1-	19DP07A104	19DP07A104	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023
DP-9I-4US	19DP369I00	19DP369I00	Medi-Cal	MAGI RE Packet	Hold For Pickup	07/01/2023
DP-4U-3UE	19DP364U000	19DP364U000	Medi-Cal	Non-MAGI RE Packet	Hold For Pickup	07/01/2023
DP-CW-900	19DP08CW0E	19DP08CW0E	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023
DP-14-	19DP07144T	19DP07144T	Medi-Cal	MAGI RE Packet	Hold For Pickup	04/01/2023

Figure 2.1.2.6 – Data Calculation Conditions (example only – calculations vary)

2.1.4 Description of Changes

1. Add a filter pane containing relevant filters to each list object that will have a data volume restriction in place (**Figures 2.1.2.1** and **2.1.2.2**).
 - a. The filterable objects on each sheet will vary depending on the table that is being filtered, ensuring all relevant table fields are represented.
2. Modify the table to restrict visualization if the number of returned records exceeds one million records (**Figure 2.1.2.3**).
 - a. The logic behind this is three-fold:
 - i. More than one million records cannot be exported from Qlik Sense based on an Excel limitation.
 - ii. More than one million records in a table format does not lend itself to realistic interpretation.
 - iii. More than one million records rendered in a single large object has very adverse performance impacts and can make the table unusable.
 - b. This is done through the table object options in Qlik (**Figure 2.1.2.6**) and will vary depending on the IDs used to calculate the number of records calculated based on current selections.
3. Modify the table logic to leverage built-in data filtering instead of relying on sheet action filters.
 - a. Adding a single column to the table in the form of a record flag will significantly reduce the loading time in most cases. Qlik will otherwise attempt to render the entire table before applying the filter, which elicits poor performance in very large tables (**Figure 2.1.2.5**).
 - b. The record flag will vary in calculation from table to table, however using a standard of 1 and null will provide superior performance and the ability to aggregate efficiently, versus using Y or N or similar conventions.

2.1.5 Counties Impacted

All counties.

2.1.6 Security Updates

No security updates or changes.

2.1.7 Report Usage/Performance

Load time for the improved tables is nearly instantaneous when calculating more than one million records. Selecting additional filters is also significantly faster and varies from table to table.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-268083

Retention of Historical FC AAP KG OP and OI Client
Correspondence for CalWIN Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erick Guanzon
	Reviewed By	Sumeet Patil

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/28/2023	1.0	Initial Draft	Erick Guanzon

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1 OVERVIEW

The CalWIN system is currently migrating client correspondence documents to CalSAWS that were generated or printed not more than 6 years. This design document provides the recommendations of how additional historical documents should be migrated to CalSAWS system.

1.1 Current Design

Figure 1 is the current architecture diagram and AWS resources that make up the CalWIN document migration process.

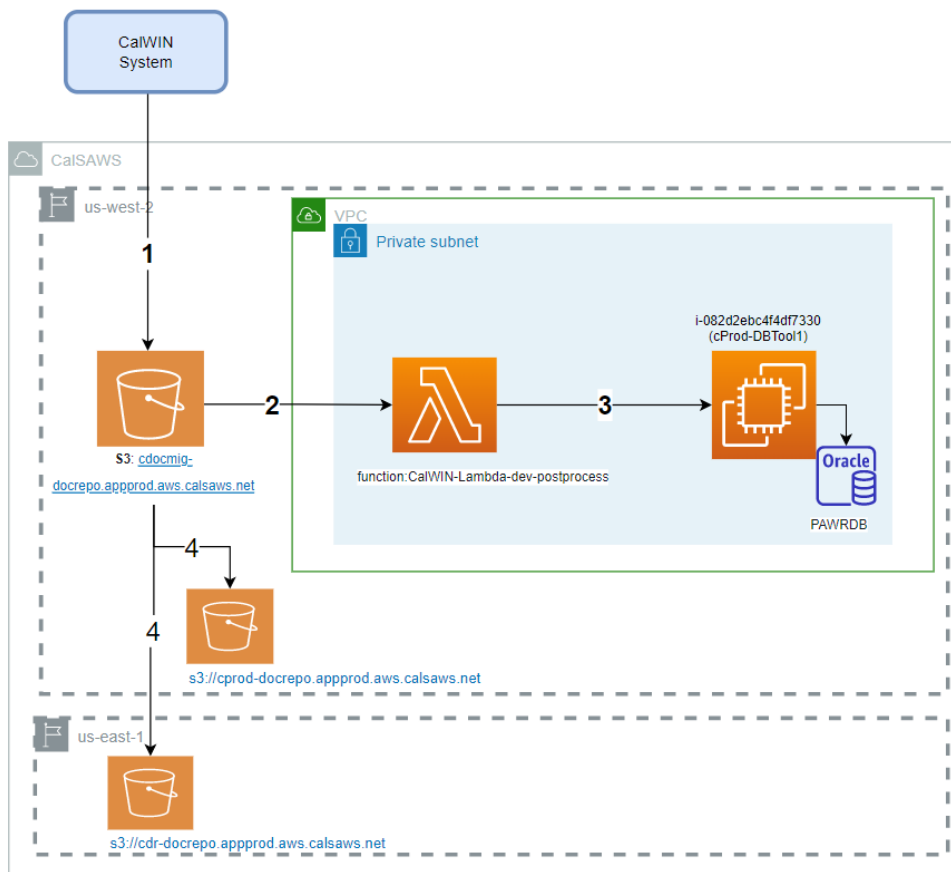


Figure 1 Current State

Sequence	Description
1	CalWIN System uploads PDF documents to CalSAWS S3 bucket.
2	CalSAWS S3 bucket sends the upload file events to a Lambda Function.

3	Lambda Function asynchronously process the events, open the PDF file, parse the document metadata and saves data to Oracle DB hosted in an EC2 instance.
4	Uploaded documents are replicated to a Production and DR S3 buckets.

1.2 Requests

Import Historical CalWIN Foster Care (FC), Adoption Assistance Program (AAP), Kin-Gap (KG), Overpayment (OP) and Over Issuance (OI) Client Correspondence to CalSAWS.

1.3 Overview of Recommendations

Existing infrastructure highlighted in Figure 1 should be able to support the additional transfer of historical documents from CalWIN. No new AWS resources are expected for this effort but will require extended availability of AWS resources. The migration of the historical documents can be broken down in two (2) parts. The first part is the transfer of documents to CalSAWS S3 bucket and collecting the metadata. The second part is the actual data migration or mapping of documents to existing production data.

1.4 Assumptions

- This migration should not change the functional behavior of the CalSAWS applications.
- The infrastructure that supports the current CalWIN document migration should be made available or should be extended based on when all the historical documents will be successfully transferred to CalSAWS.
- The affected CalWIN county dataset is already converted and exists in CalSAWS.
- The change request should happen before the Archival Phase 1 SCR to avoid complexity and potential another change request to accommodate a different Datasource.
- About ~ 8.3 million documents are expected to be migrated to CalSAWS.
- The estimated total object size that will be uploaded to S3 is about 398 GB.
- The click through testing from the online page from PUT and PAT environments is not applicable since the documents are not replicated to S3 buckets for these test environments. However, file linkage should be available for manual inspection via the browser's developer tools.

2 RECOMMENDATIONS

2.1 Description of Changes

The following sections outline the required components and strategies to successfully import the files and to merge the S3 file location of converted document records in CalSAWS.

2.1.1 File Storage and Metadata Collection

- The historical files from CalWIN should be stored in S3 bucket using the existing folder structure:
 - <County ID>/Historical/<yyyy-mm-dd>/<file.pdf>
 - Example: 34_SAC/Historical/2012-01-01/example.pdf
- Metadata from the PDF bookmark will be collected and stored in **CALWIN_DOC_MIG** table in **PAWRDB** database.
- The Database and the Lambda Function will continue to enforce the existing data validation.

2.1.2 File Mapping to Existing Production Dataset

- Collected metadata that contains the S3 file location of uploaded historical documents should be copied to the database that contains the master copy of **XREF** data used during the CalWIN conversion.
- A new temp table should be created that identifies the affected **GENERATE_DOC** records and the corresponding **ALF_FMS_NUM** value.
- A **NEW Merge script** should be developed and should utilize the generated temp table to update the records in **GENERATE_DOC** table.
- The migrations should follow the Production's Manual DCR (Data Change Request) process.

2.1.3 DB Resources and Data Flow

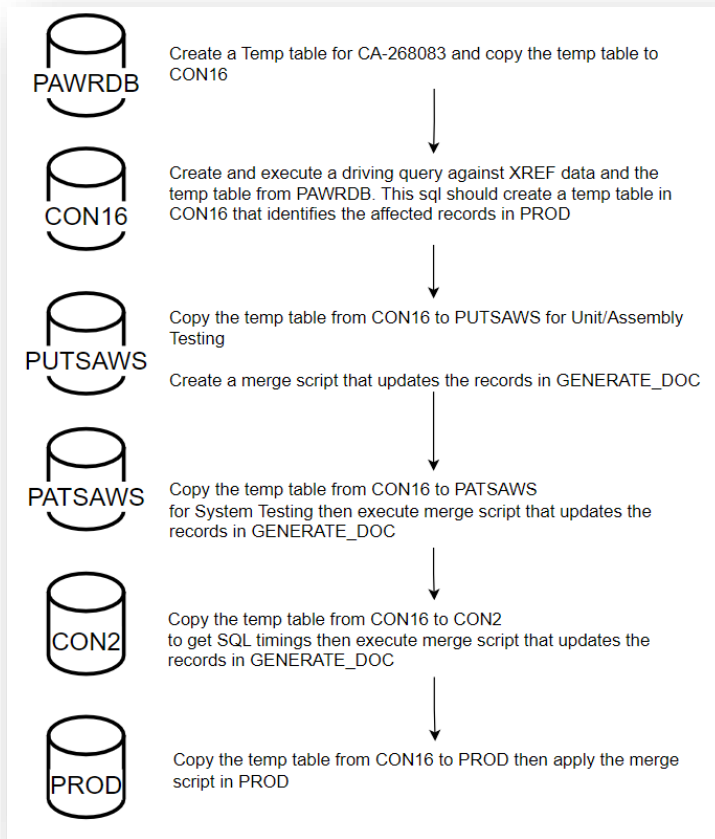


Figure 2 DB Resources and Data Flow

2.2 Security Updates

N/A

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

--	--	--	--

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-268567

CAP - Apply \$20 General Exclusion to Total
Unearned Income

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Business Analysts, Build team, Test Team

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/16/2023	1.0	Initial Draft	Yale Yee

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1 OVERVIEW

1.1 Current Design

A \$20 general exclusion is applied to the spouse's SSI/SSP amount. The unused \$20 general exclusion is not counted as earned income.

1.2 Requests

1. A \$20 general exclusion should not be applied to the spouse's SSI/SSP amount.
2. The unused \$20 general exclusion is counted as earned income.

1.3 Overview of Recommendations

1. Update the CAPI EDBC to not apply a \$20 general exclusion to the spouse's SSI/SSP amount.
2. Update the Budget Calculation for SOC 452 Column A to calculate the unused \$20 general exclusion as earned income.
3. A list of Active CAPI cases where the \$20 general exclusion is applied to the spouse's SSI/SSP amount will be provided.

1.4 Assumptions

1. CA-269797 will identify all Income Based on Needs (line 5a and 5b) on the SOC 452 for CAPI.

2 RECOMMENDATIONS

2.1 Update CAPI EDBC when Applying a \$20 General Exclusion

2.1.1 Overview

Update CAPI EDBC to not apply a \$20 general exclusion to the spouse's SSI/SSP amount.

2.1.2 Description of Changes

1. A spouse's SSI/SSP income is counted as unearned income as "Income based on need" on the SOC 452 Column A for a couple's case.
 - a. The \$20 General Exclusion is not deducted for a spouse's SSI/SSP income.
2. Update CAPI EDBC to not apply a \$20 general exclusion to the spouse's SSI/SSP amount.

Technical note: the \$20 general exclusion is currently named \$20 Any Income Deduction.

2.1.3 Programs Impacted

CAPI

2.1.4 Performance Impacts

N/A

2.2 Update the Budget Calculation for SOC 452 Column A

2.2.1 Overview

When determining the budget for the SOC 452 column A, additional calculations will be added.

2.2.2 Description of Changes

1. The unused \$20 exclusion is added to the Earned Income.
 - a. When subtracting the \$20 General Exclusion from the total unearned income, the remaining amount of General Exclusion is added to the Earned Income.
2. The remaining self support plan is subtracted from the earned income.
 - a. When subtracting the Self Support Plan exclusion from the unearned income, the remaining amount of self support plan is subtracted from the earned income.

- i. The worker will need to manually calculate the self support plan amount and override the EDBC results or create a manual EDBC.

2.2.3 Programs Impacted

CAPI

2.2.4 Performance Impacts

N/A

2.3 Automated Regression Test

2.3.1 Overview

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

2.3.2 Description of Changes

Create a CAPI program with two persons. Give the spouse SSI/SSP income, some other unearned income, and earned income. Run EDBC and confirm that the General Exclusion amount is only applied to the other unearned income and earned income.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.11.1.11	The LRS shall establish and maintain the total assistance paid and shall generate a collection notice to the participant whenever a participant incorrectly receives an initial SSI payment, for GR and CAPI.	The \$20 Any Income Deduction is not applied to the SSI/SSP amount of the Spouse.

4 OUTREACH

4.1 Lists

Provide a list of Active CAPI cases where the \$20 general exclusion is applied to the spouse's SSI/SSP amount.

List Name:

List_of_Active_CAPI_Cases_Where_General_Exclusion_Applied_to_SSI_SSP

List Criteria: List of Active CAPI cases where the \$20 general exclusion is applied to the spouse's SSI/SSP amount.

Standard Columns:

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

Additional Column(s): N/A

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-268567

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-269641

LA County - Update GA program EDBC Sweeps to
trigger EDBC for CF/NB

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	Balakumar Murthy, Caroline Bui, Deanna Rotert, Adelaide Mendoza, Howard Suksanti

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/23/2023	1.0	Initial Draft	Edgars Reinholds

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1 OVERVIEW

1.1 Current Design

LA County GA batch EDBC sweeps are running in Single Program (SP) mode only for General Assistance/General Relief (GA) program and do not run for CalFresh (CF) or Nutritional Benefit (NB).

SCRs CA-269590, CA-269591 implemented to correct 11/2023 benefit month.

SCR CA-269639 created to correct flip records to Targeted Program mode before Batch EDBC.

1.2 Requests

Update LA County GA Batch EDBC Sweeps to insert batch EDBC trigger record in Targeted Program (PP) mode with CalFresh and NB programs.

Create a new batch EDBC sweep to sync CalFresh if it was not run at the same time or after GA.

1.3 Overview of Recommendations

1. Update Batch EDBC Sweeps to insert into SYS_TRANSACT with PP (Targeted Program Mode) and program list of 'GA;FS;NB'.
2. Create a new batch EDBC sweep to sync CalFresh if it was not run at the same time or after GA.

1.4 Assumptions

1. FS is the system code for CalFresh.
2. No functional changes will be made to the existing jobs.
3. This change does not impact Migration Counties.

2 RECOMMENDATIONS

2.1 Update Batch EDBC Sweep Jobs

2.1.1 Overview

Update Batch EDBC Sweep job to trigger Batch EDBC for GA program in Targeted Program Mode (PP) and program list of 'GA;FS;NB'. This will also run Batch EDBC for the same effective month for CF and NB programs, if they are active on the case.

2.1.2 Description of Change

1. Update the following Batch EDBC Sweep job to trigger Batch EDBC for GA program in Targeted Program Mode (PP) and program list of 'GA;FS;NB'.
 - a. PB00E148 - Death Sweep Job
 - b. PB00E168 - Monthly GR Time Limits Discontinuance
 - c. PB00E173 - Discontinue GR Cases for Non Receipt of completed QR7/AnnualAgreement Forms
 - d. PB00E184 - MSARP Assessment No Show
 - e. PB00E185 - MSARP Non-Compliance
 - f. PB00E186 - GR/GROW Non-Compliance
 - g. PB00E197 - Daily GR Time Limits Discontinuance
 - h. PB19E480 - Monthly GR Employability Status Change, work registration change/update
 - i. PB19E481 - Daily GR Employability Status Change
 - j. PB19E482 - GR health Assessment
 - k. PB19E484 - Other Program Assistance EDBC Sweep for only GA/GR program
 - l. PB19E700 - Daily Money Management GR Sweep
 - m. PI19C808 - Probation Reader
 - n. PI19C824 - Jail Match Reader
 - o. PI19F1601 - Child Support Reader

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

LA County.

2.1.6 Category

No Change.

2.1.7 Data Volume/Performance

N/A.

2.1.8 Failure Procedure/Operational Instructions

The Batch Operations Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to resolve the failure.

2.2 Create a new GA/CF Sync Batch EDBC Sweep Job

2.2.1 Overview

Create a new GA/CF Sync Batch EDBC sweep job to sync CalFresh with GA program, if it was not run at the same time or after GA EDBC.

2.2.2 Description of Change

1. Create a new Batch EDBC Sweep job to trigger Batch EDBC in Targeted Program Mode (PP) with program list of 'FS;NB' when the following conditions are met:
 - a. A regular, accepted and saved GA program EDBC has been executed since the last successful execution of this job.
 - b. There exists an Active CalFresh program on the same case for the same effective date as the GA EDBC.
 - c. There does NOT exist a regular, accepted and saved CalFresh EDBC for the same effective period as the GA EDBC in which the run date is equal to or greater than the GA EDBC.
 - d. The GA EDBC was run for the current and/or come-up month.

2.2.3 Execution Frequency

Daily – Mon-Sat.

2.2.4 Key Scheduling Dependencies

Successor – Batch EDBC

2.2.5 Counties Impacted

LA County.

2.2.6 Category

Core.

2.2.7 Data Volume/Performance

Estimated 500 records daily.

2.2.8 Failure Procedure/Operational Instructions

The Batch Operations Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to resolve the failure.

2.3 Update EBT Account Aging Reader PI19F400

2.3.1 Overview

Update EBT Account Aging Reader job to trigger Batch EDBC for GA program in Targeted Program Mode (PP) and program list of 'GA;FS;NB'. This will also run Batch EDBC for the same effective month for CF and NB programs, if they are active on the case.

2.3.2 Description of Change

1. Update EBT Account Aging Reader job to trigger Batch EDBC for GA program in Targeted Program Mode (PP) and program list of 'GA;FS;NB'.

2.3.3 Partner Integration Testing

Not Required.

2.3.4 Execution Frequency

No Change.

2.3.5 Key Scheduling Dependencies

No Change.

2.3.6 Counties Impacted

LA County.

2.3.7 Category

No Change.

2.3.8 Data Volume/Performance

N/A.

2.3.9 Interface Partner

N/A.

2.3.10 Failure Procedure/Operational Instructions

The Batch Operations Support Team will evaluate errors, diagnose the issue and work with the appropriate teams to resolve the failure.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.11	The LRS shall automatically trigger batch processing and/or authorize the action when individual or case information is entered through online, interface, or batch processes.	Triggering Batch EDBC for the required programs GA, CF and NB.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-269863~~CA-2XXXXX~~

eCCP Telephonic Signature Messaging

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	TBD

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/23/2023	0.1	Initial Documentation	Jared Kuester

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1 OVERVIEW

This recommendation is to add informational messages to the eCCP when capturing a telephonic signature.

1.1 Current Design

When a contact center agent captures a telephonic signature in the eCCP, the play button becomes a pulsating red recording icon, and all buttons are grayed out when the recording is stopped. Once the agent has stopped the recording, the signature will be processed and available in CalSAWS after the agent completes and disconnects the call with the customer. There is no messaging for the agent; they are required to hang up the call with the customer before the signature will appear in CalSAWS. There is no messaging that they must hang up the call for the recording to ever show up in CalSAWS, or that the recording has started, stopped, or restarted.

1.2 Requests

Add a message after a successful telephonic signature is captured through eCCP informing the agent that the call must be disconnected before the signature will appear in CalSAWS. Also add in indicator messages that the recording has started, stopped, and been restarted when pressing the corresponding buttons, through eCCP informing the agent that the call must be ended before the signature will appear in CalSAWS. Also add in indicator messages that the recording has started, stopped, and been restarted when pressing the corresponding buttons.

1.3 Overview of Recommendations

1. Update the eCCP ~~Messaging~~Messaging.
 - a. Display the following message "~~Telephonic Signature successfully captured, please allow 5 – 10 minutes for processing after ending the call~~".
 - b. Add the message "~~Telephonic Signature Recording Started~~Recording Started" when pressing the start button.
 - c. Add the message "~~Telephonic Signature~~ Recording Stopped" when pressing the stop button.
 - d. Add the message "~~Telephonic Signature Recording Re-Started, Recording Restarted~~" when pressing the reset button.

1.4 Assumptions

1. Messages are informational only and do not impact functionality.
2. There is no change to the process of capturing a telephonic signature through the eCCP.

2 RECOMMENDATIONS

2.1 eCCP Messaging

2.1.1 Overview

This recommendation is to add an informational message to the eCCP when capturing a telephonic signature. This message will instruct the agent to hang up the call and wait ~~five to ten minutes~~ several minutes for processing once the call is complete.

2.1.2 eCCP Messaging Mockups

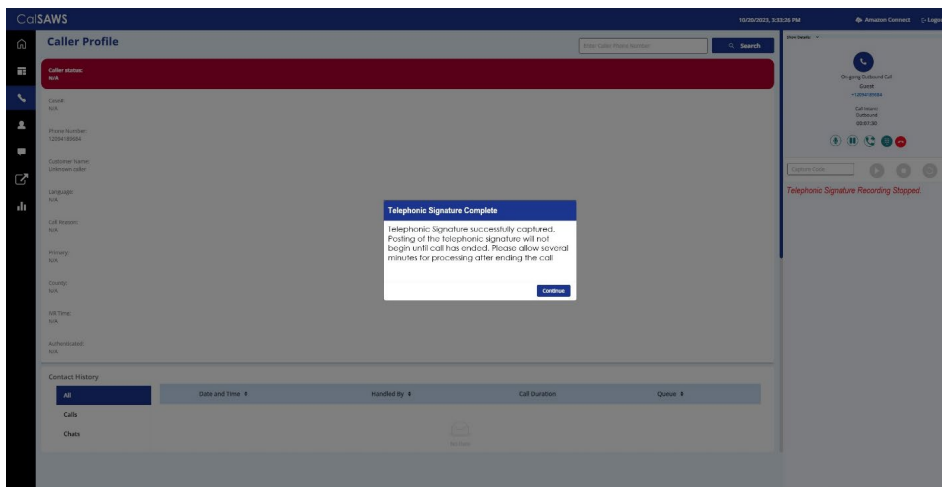


Figure 2.1.2.1 – Telephonic Signature Pop-Up Message

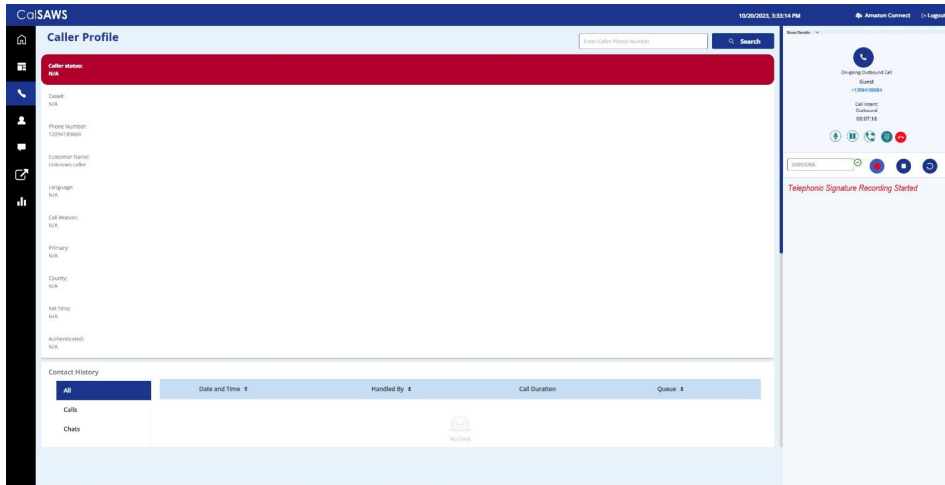


Figure 2.1.2.2 – Recording Started Message

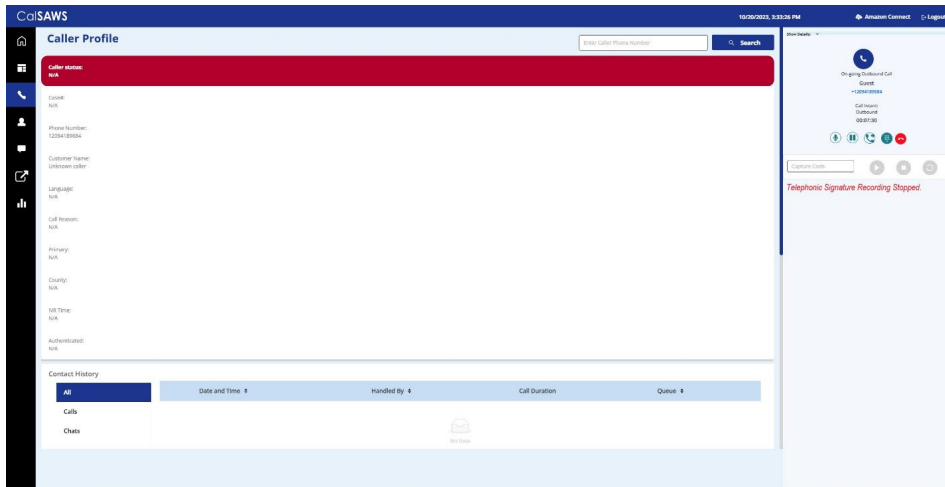


Figure 2.1.2.3 – Recording Stopped Message

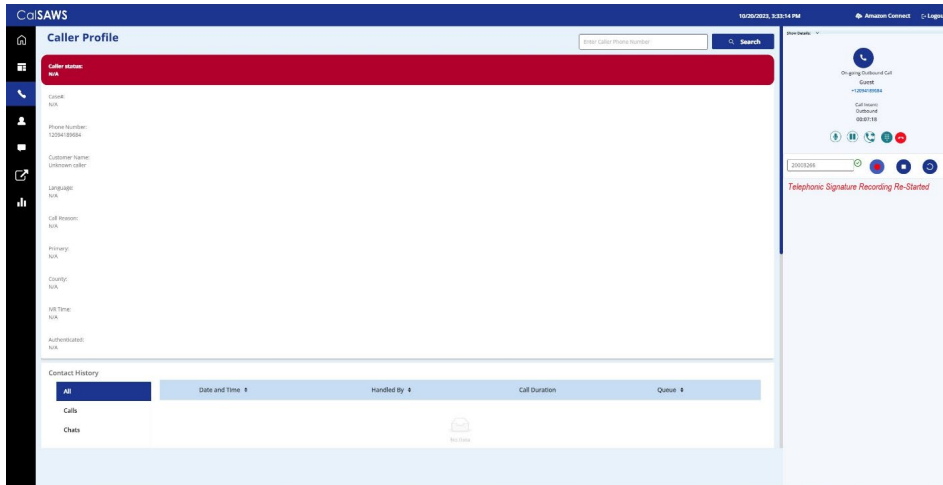


Figure 2.1.2.4 – Recording Restarted Message

2.1.3 Description of Changes

1. Add a pop-up message to the eCCP when a telephonic signature is successfully captured.
 - a. Display the following message "Telephonic Signature successfully captured. Posting of the telephonic signature will not begin until call has ended, please allow 5–10 minutes for processing after ending the call!".
2. Add messages below the Telephonic Signature block when pressing the buttons.
 - a. When the Start button is pressed, display the message "Recording Telephonic Signature Recording started" Started below the Telephonic Signature block.
 - i. Display this message for 5 seconds.
 - b. When the Stop button is pressed, display the message "Telephonic Signature Recording stopped" Recording Stopped below the Telephonic Signature block.
 - i. Display this message for 5 seconds.

~~When the Stop button is pressed and a telephonic signature is not successfully capture, display the message "Telephonic Signature was not captured" below the Telephonic Signature block~~

~~Display this message for 5 seconds.~~
 - c. When the Restart button is pressed, display the message "Telephonic Signature Recording re-started. Previous recording

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~~discarded" Recording Restarted~~ below the Telephonic
Signature block.
i. Display this message for 5 seconds.

2.1.4 Page Location

- **Global:** Admin tools
- **Local:** Office Admin
- **Task:** Call Control Panel

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3 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246966

Update NOA reason for CalWORKs ICT Notice of
Transfer, Receiving (M40-195B)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sujit Neupane
	Reviewed By	[individual(s) from Build and Test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2023	1.0	Initial Draft	Sujit Neupane

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1 OVERVIEW

This effort is to update the existing M40-195B Intercounty Transfer (ICT) Notice of Transfer, Receiving to match the latest state 08/2022 version.

1.1 Current Design

CalSAWS currently has the outdated M40-195B (11/17).

1.2 Requests

Update M40-195B to the latest state 08/2022 version.

1.3 Overview of Recommendations

1. Update the CalWORKs "ICT Notice of Transfer, Receiving M40-195B" to match the State version (08/2022).

1.4 Assumptions

1. The M40-195A Form will be updated to the newest State version as a part of SCR CA-267387.
2. This effort will only update the M40-195B in the languages currently available in the system. Additional threshold languages will be added with CA-267396.
3. We are not updating generation conditions of the M40-195B as a part of this SCR. This effort will only update the existing NOA verbiage to match the newest State version.

2 RECOMMENDATIONS

2.1 Update the CalWORKs program's Intercounty Transfer (ICT) Notice of Transfer, Receiving: M40-195B NOA Reason

2.1.1 Overview

This recommendation is for updating ICT Notice of Transfer, Receiving (M40-195B) to match the updated State version (08/2022).

Reason Fragment Name and ID: ICT Notice of Transfer, Receiving (CW_AP_ICT_CW_APPR_A885A, ID: 7523)

State Form/NOA: M40-195B (08/2022)

Current NOA Template: CW_NOA_TEMPLATE

Current Program(s): CalWORKs

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Chinese, Spanish, Vietnamese

2.1.2 Form/NOA Verbiage

Update CalWORKs NOA Reason Fragment XDP

Update "CalWORKs ICT Notice of Transfer, Receiving" reason fragment with three new additional variables and updated verbiage.

Updated Languages:

English, Chinese, Spanish, Vietnamese

Note: SCR CA-267396 will add additional threshold languages.

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	<p>{OldCounty} County has transferred your CalWORKs case to our county. The cash aid payment for your first month of aid is {BenefitAmount}. Your first day of cash aid is {DateEligibilityBegins}. This letter has your new case number, worker's name and telephone number. Please refer to this letter when you contact us.</p> <p>You will get a new Electronic Benefits Transfer card (EBT) for the aid listed above. If you don't get a new EBT card, please contact our office. If you still have aid on your EBT card from your old county, you can use that card until the aid is gone. You will not be able to use your old EBT card for the aid listed above.</p> <p>You must report changes that could affect your eligibility on your next periodic report or at your next redetermination and to the worker listed in this notice.</p>	<p>{OldCounty} County has sent your CalWORKs case to our county. The cash aid payment for your first month of aid is \${BenefitAmount}. Your first day of cash aid in this county is {DateEligibilityBegins}.</p> <p>This letter has your new case number, worker or county information and telephone number. Please refer to this letter when you contact us.</p> <p>You will get a new electronic benefits transfer card (EBT) for the aid listed above. If you don't get a new EBT card, please contact our office.</p> <p>If you still have aid on your EBT card from your old county, you can use that card until the aid is gone. You will not be able to use your old EBT card for the aid listed above.</p> <p>You can apply for homeless assistance (HA) in this county if you are homeless.</p> <p>If you had any unpaid overpayments in your old county that were sent to us, our county will collect them. You will get a notice with the date we will start to collect. This notice will also explain how we will collect the overpayment.</p> <p>All reports you are required or choose to</p>	<p>Arial</p> <p>Font Size 10</p> <p>Variables NewCountyName, NewPhoneNum, CaseNumber should be underlined.</p>

		<p>make, including your periodic reports and redeterminations should be made to the county listed in this notice.</p> <p>If you have any questions, please call:</p> <p>County name {NewCountyName}</p> <p>Telephone Number {NewPhoneNum}</p> <p>Case Number {CaseNumber}</p>	
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*English only, Spanish and threshold will generate based on project standards for that language.

Figure 2.1.1 – NOA Reason Verbiage

2.1.3 Form/NOA Variable Population

1. Add new variables for CalWORKs Reason:

Add and populate new variables for new county name, new county telephone number and CalWORKs case number. They are already available in existing header.

Variable Name	Population	Formatting*
NewCountyName	Populate with the new county name from the NOA header	Arial Font Size 10, Underlined
NewPhoneNum	Populate with phone number of the new county from the NOA header	Arial Font Size 10, Underlined
CaseNumber	Populate with the CalWORKs case number from the NOA header	Arial Font Size 10, Underlined

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

Variables Requiring Translations: None

2. Update Fragment Regulations

Update the Regulations for the ICT Notice of Transfer, Receiving M40-195B to match the newest State version:

MPP 40-188, 40-190, 44-352

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	NOA	NOA Mockup	M40-195B Mockup