

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-204905

Modify the Disabled (EDBC determined)
Exemption Batch Job

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/1/2023	1.0	Initial draft	Howard Suksanti
8/30/2023	2.0	Added Eligibility Recommendations	Tom Lazio
11/17/2023	3.0	Cosmetic and verbiage updates based on committee feedback.	Tom Lazio
01/03/2024	4.0	<ul style="list-style-type: none"> • Added assumption # 5 and #6 to Section 1.4. • Removed recommendation and references for populating 'Expected End Date' for high dated medical condition records and included SSDI (EDBC determined) status reason in the following sections: <ul style="list-style-type: none"> ○ Section 1.2 ○ Section 1.3 ○ Section 2.1.1 ○ Section 2.1.2 • Updated list criteria for Section 4.1. • Updated Sections 2.4, 2.5, 2.6 and 2.7 for the Automated Action Task functionality." • Updated section 2.2.2 & 2.3.2 with the additional medical record types 	Tom Lazio Vallari Bathala Howard Suksanti

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1 OVERVIEW

This SCR will update the trigger conditions of the Welfare-to-Work (WTW) Exempt batch.

1.1 Current Design

Currently, staff are not required to update an End Date on the Medical Condition page. When a medical condition record is created for a CW participant, the system applies a Disabled (EDBC determined) or SSDI (EDBC determined) Exempt Status reasons on the WTW or REP Work Registration page with no expected end date or end date. This issue is resulting in participants being exempted indefinitely due to disability and the participants are not being registered into the WTW or REP program when the exemption ends. As a result, the issue is that for participants who report a permanent disability or who are granted a WTW/REP disability exemption are not being evaluated on an annual basis.

In addition, the current batch job is erroneously granting the disability exemption based on disability types used for other programs (e.g., CalFresh, Medi-Cal, Kin-GAP) and to children. ACL 15-08 requires the participant's disability exemption to be reviewed at least annually (e.g., redetermination) for chronic or permanent conditions.

Cases are not meeting federal WPR since they are erroneously being exempted due to an ongoing disability. In addition, current medical verification may not be on file to substantiate the disability. Participants who are erroneously exempted due to disability may not be receiving services through the WTW/REP Program or be accurately tracked through State and departmental reports and are erroneously receiving a disability clock stopper.

1.2 Requests

1. Populate 'Expected End Date' for 'Exempt' (EDBC determined) Work Registration Detail records created for future end dated Medical Condition records.
2. Modify the criteria for the current Disabled (EDBC determined) exemption batch.
3. Modify the criteria for the current Removed (EDBC determined) exemption batch.
4. Generate listing of WTW/REP exempt individuals with high dated or future end dated Medical Conditions.
5. Add new Automated Actions to create a Task for 'Exempt' Work Registration Detail records with a Begin Date that is 11 or more months in the past.

1.3 Overview of Recommendations

1. Update the EDBC auto generate work registration logic to populate 'Expected End Date' for 'Exempt' Work Registration Detail records with status reasons Disabled (EDBC determined) or SSDI (EDBC determined) created for WTW/REP participants with future end dated Medical Condition records.
2. Modify the criteria for the current Disabled (EDBC determined) exemption batch (PB00E190).
3. Modify the criteria for the current Removed (EDBC determined) exemption batch (PB00E189).
4. Generate list of cases with exempt WTW/REP participants with high dated or future end dated Medical Condition records.
5. Create a new Automated Action to alert the worker when an 'Exempt' Work Registration record is 11 months or older.
6. Create a new Automated Action to alert the worker when a Work Registration record with a Medical Condition exemption is 11 months or older.

1.4 Assumptions

1. EDBC already has logic that 'end dates' the 'Exempt' Work Registration records for records where the Medical Condition 'End Date' field has been populated.
2. After the worker receives the reminder task, it is the worker's responsibility to either enter or update the 'End Date' the Medical Condition Record and/or update 'Expected End Date' of the exempt Work Registration record.
3. The functionality introduced with this SCR will take effect upon implementation.
4. On a scenario that a case has an existing medical condition record and the Work Registration is already in exempt status, the batch does not auto trigger EDBC if worker added an End date to the medical condition record.
5. Change reason logic will be updated with SCR CA-234705 which will allow the user to apply mid period data changes such as end dating Medical Condition records to end work registration exemptions immediately.
6. If the user updates the Medical Condition end date after the exempt Work Registration record is generated, the 'Expected End Date' will not be auto updated.
7. No change expected to the existing work registration exemption hierarchy. The 'SSDI (EDBC determined)' work registration exemption will be considered before the 'Disabled (EDBC determined)' work registration exemption when there are multiple medical conditions.

2 RECOMMENDATIONS

2.1 Modify EDBC Exempt Work Registration Auto Creation Logic

2.1.1 Overview

The EDBC auto generation logic currently creates work registration 'Exempt' records with status reasons 'Disabled (EDBC determined)' or 'SSDI (EDBC determined)' on the Work Registration Detail page for WTW or REP participants with active, high-dated, or future end dated Medical Condition records. It does not currently populate Work Registration 'Expected End Date' for future end dated Medical Condition records.

The request is to modify the 'Exempt' Work Registration auto generation logic to populate the 'Expected End Date' on the Work Registration Detail page for work registration records created for active, future end dated Medical Condition records.

The screenshot displays the 'Medical Condition Detail' page. At the top, there are buttons for 'Images', 'Edit', and 'Close'. Below this is a 'Change Reason' section with a 'View' button. The main details section includes:

- Change Reason:** Participant Provided - Verbal
- Reported Date:** 08/31/2023
- Name:** Mom, WTCW 25F
- Medical Condition Category:** Active
- DDSD Re-Exam Date:**
- Verified:** Verified (with a 'View' button)
- Medical Condition Type:** Incapacity - Verifiable and at Least 30 Days

There are three questions with 'No' answers:

- Does this person need care so that someone else can work or attend school? * No
- Does this person need help with activities of daily living through personal assistance or a medical facility? * No
- Does this person work and have medical expenses that are needed to help them keep working? * No

At the bottom, there are three date fields:

- Begin Date:** 08/01/2023
- End Date:** 08/01/2024
- Expected Length of Condition:**

Figure 2.1.1.1 – Active Medical Record with a future end date greater than current system date

Work Registration Detail

*- Indicates required fields

Edit

Close

Name: * Mom, WTCW 25F	Type: * WTW	
Status: * Exempt	Status Reason: * Disabled (EDBC determined)	
Volunteer: * No	Excluded: * No	
Begin Date: * 08/01/2023	End Date:	Expected End Date:

Figure 2.1.1.2 – Exempt Work Registration with Status Reason ‘Disabled (EDBC determined)’ created for WTW participant with active, future end dated Medical Condition record (No Expected End Date) – Before SCR

Work Registration Detail

*- Indicates required fields

Edit

Close

Name: * Mom, WTCW 25F	Type: * WTW	
Status: * Exempt	Status Reason: * Disabled (EDBC determined)	
Volunteer: * No	Excluded: * No	
Begin Date: * 08/01/2023	End Date:	Expected End Date: 08/01/2024

Figure 2.1.1.3 – Exempt Work Registration with Status Reason ‘Disabled (EDBC determined)’ created for WTW participant with active, future end dated Medical Condition record (Expected End Date equal to future end date of the Medical Condition record) – After SCR

2.1.2 Description of Changes

1. Update existing EDBC Auto Program Action Work Registration generation logic to populate Work Registration **Expected End Date** to be equal to the latest **end date** of the Medical Condition record that autogenerates the Work Registration ‘Exempt’ record with status reason of ‘Disabled (EDBC determined)’ or ‘SSDI (EDBC determined)’.

2.1.3 Programs Impacted

WTW

REP

2.2 Modify the criteria for the current Disabled (EDBC determined) exemption batch (PB00E190).

2.2.1 Overview

Modify the criteria for the current Disabled (EDBC determined) exemption batch to only grant this exemption on the Work Registration page for WTW/REP participants based on the conditions in the following section. This batch (PB00E190) is currently turned off.

The current trigger condition of the batch is below:

1. CalWORKs/RCA Program is Active as of batch run date.
2. The person status is active as of batch run date.
3. There is a Verification record of type medical condition with the status of Verified.
4. The Work Registration record for this person is not in Exempt status.
5. There is a medical condition record with a Category of Active.

2.2.2 Description of Change

Modify the criteria for the current Disabled (EDBC determined) exemption batch to only grant this exemption on the Work Registration page for WTW/REP participants when the following conditions are met:

- CalWORKs/RCA Program is Active.
- Individual is CW/RCA Active with any Role code.
- Medical Condition Category is Active,
- Medical Condition (Category of Active) Type is in one of the following:
 - a. Incapacity – Verifiable and at least 30 days
 - b. SP-DDSD Blind
 - c. SP-DDSD Disabled
 - d. SSA Disabled
 - e. SSA Blind
 - f. SSI Blind
- The Work Registration record for this person is not in Exempt status.
- There is a Verification record of type medical condition with the status of Verified.
- End Date of the Medical Condition record is in the future date as compared to the batch date or High Date.

Create a Batch Schedule Change Request (BSCR) to turn on PB00E190.

Note: This batch sweep job will use the updated Exempt Work Registration Auto Creation EDBC logic detailed in Section 2.1 which will populate Expected End Date field.

2.2.3 Execution Frequency

Monthly - Batch 10-day cutoff.

2.2.4 Key Scheduling Dependencies

Before Batch EDBC Processing job.

2.2.5 Counties Impacted

All Counties.

2.2.6 Category

Core.

2.2.7 Data Volume/Performance

N/A.

2.2.8 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...)

2.3 Modify the criteria for the current Reevaluate (EDBC determined) exemption batch (PB00E189).

2.3.1 Overview

Modify the criteria for the current Reevaluate (EDBC determined) exemption batch to end date the exemption on the Work Registration page for WTW/REP participants based on the conditions in the following section.

The current trigger condition of the batch is below:

1. CalWORKs/RCA Program is Active as of batch run date.
2. The person status is active as of batch run date.
3. There is a Work Registration record with a type of WTW/REP.
4. Work Registration status is Exempt.
5. Work Registration Status Reason code is Physically/Mentally Incapacitated or Disabled (EDBC determined)

6. There is a Verification record of type medical condition with the status of Verified.
7. There is a medical condition record with a Category of Active.
8. The medical condition record End Date is on or before the last day of the month.
9. There is no future Mandatory Work Registration record in the future.
10. There is no future medical condition for the person.

2.3.2 Description of Change

Modify the criteria for the current Disabled (EDBC determined) exemption batch to only grant this exemption on the Work Registration page for WTW/REP participants when the following conditions are met:

- CalWORKs/RCA Program is Active as of batch run date,
- Individual is CW/RCA Active as of batch run date.
- Work Registration status is Exempt.
- Work Registration Status Reason code is Physically/Mentally Incapacitated or Disabled (EDBC determined) or 'SSDI (EDBC determined)'
- Medical Condition Category is Active,
- Medical Condition Type is one of the following:
 - a. Incapacity – Verifiable and at least 30 days
 - b. SP-DDSD Blind
 - c. SP-DDSD Disabled
 - d. SSA Disabled
 - e. SSA Blind
 - f. SSI Blind
- The medical condition record End Date is on or before the last day of the current month.
- There is no future Mandatory Work Registration record in the future.
- There is no future medical condition record for the person.
- There is a Verification record of type medical condition with the status of Verified.

Note: The existing EDBC logic will update the 'Exempt' work registration record end date as of the end of the current month. If there are no effective medical condition records, it will create a 'Mandatory' work registration record beginning the first of the following month.

2.3.3 Execution Frequency

No Change (Batch 10-day cutoff).

2.3.4 Key Scheduling Dependencies

No Change.

2.3.5 Counties Impacted

All Counties.

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

N/A.

2.3.8 Failure Procedure/Operational Instructions

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

2.4 Work Registration: Exempt for 11 Months Automated Action

2.4.1 Overview

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

2.4.2 Automated Action Detail Mockup

Automated Action Detail

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

Action Information

Name: Work Registration: Exempt for 11 Months	Type: Create Task	Status: * Inactive
Program(s): RE, WT	Run Date: 1st day of each month(Mon-Sat)	Source: Batch

Scenario:
An Exempt Work Registration with a Status Reason of 'Physically/Mentally Incapacitated', 'Disabled (EDBC determined)' or 'SSDI (EDBC determined)' has a Begin Date that is 11 or more months in the past and an End Date has not been entered.

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:
An Exempt Work Registration record has a Begin Date that is 11 or more months in the past and an End Date has not been entered. Review and update the Work Registration End Date accordingly.

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

Figure 2.4.2-1 – Automated Action Detail View Mode

Automated Action Detail

Action Information

Name: Work Registration: Exempt for 11 Months	Type: Create Task	Status: * <input type="text" value="Inactive"/>
Program(s): RE, WT	Run Date: 1st day of each month(Mon-Sat)	Source: Batch

Scenario:
An Exempt Work Registration with a Status Reason of 'Physically/Mentally Incapacitated', 'Disabled (EDBC determined)' or 'SSDI (EDBC determined)' has a Begin Date that is 11 or more months in the past and an End Date has not been entered.

Task Information

Task Type: *

Due Date: <input type="text" value="Default Due Date"/>	Default Due Date: 5 Business Days
Initial Assignment: <input type="text" value="Default Assignment"/>	Default Assignment: Current Program Worker

Sibling Assignment:

Long Description:
An Exempt Work Registration record has a Begin Date that is 11 or more months in the past and an End Date has not been entered. Review and update the Work Registration End Date accordingly.

Figure 2.4.2-2 – Automated Action Detail Edit Mode

2.4.3 Description of Changes

Implement a Work Registration: **Exempt for 11 Months** Automated Action. 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. Work Registration: Exempt for 11 Months

a. Action Information

- i. Name: Work Registration: **Exempt for 11 Months**
- ii. Type: Create Task
- iii. Status: Inactive
- iv. Program(s): RE, WT
- v. Run Date: 1st day of each month(Mon-Sat)
- vi. Source: Batch

vii. Scenario: An Exempt Work Registration with a Status Reason of 'Physically/Mentally Incapacitated', 'Disabled (EDBC determined)' or 'SSDI (EDBC determined)' has a Begin Date that is 11 or more months in the past and an End Date has not been entered.

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: An Exempt Work Registration record has a Begin Date that is 11 or more months in the past and an End Date has not been entered. Review and update the Work Registration End Date accordingly.

2.4.4 Page Validations

N/A

2.4.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
 - Click on the hyperlink of the “Work Registration: Upcoming Exemption Expected End Date” Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
 - The Task Navigation will display if the user profile contains the “AutomatedActionsListView” security right.

2.4.6 Security Updates

N/A

2.4.7 Page Mapping

N/A

2.4.8 Accessibility

The following accessibility enhancements have been identified:

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

2.4.9 Page Usage/Data Volume Impacts

N/A

2.5 Medical Condition: Exemption for 11 Months Automated Action

2.5.1 Overview

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

2.5.2 Automated Action Detail Mockup

Automated Action Detail

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

Action Information

Name: Medical Condition: Exemption for 11 Months	Type: Create Task	Status: * Inactive
Program(s): RE, WT	Run Date: 1st day of each month(Mon-Sat)	Source: Batch
Scenario: A Medical Condition exemption has a Begin Date that is 11 or more months in the past and an End Date has not been entered.		

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: A Medical Condition exemption has a Begin Date that is 11 or more months in the past and an End Date has not been entered. Review and update the Medical Condition End Date accordingly.	

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

Figure 2.5.2-1 – Automated Action Detail View Mode

Automated Action Detail

Action Information

Name: Medical Condition: Exemption for 11 Months	Type: Create Task	Status: * Inactive ▾
Program(s): RE, WT	Run Date: 1st day of each month(Mon-Sat)	Source: Batch

Scenario:
A Medical Condition exemption has a Begin Date that is 11 or more months in the past and an End Date has not been entered.

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:
A Medical Condition exemption has a Begin Date that is 11 or more months in the past and an End Date has not been entered. Review and update the Medical Condition End Date accordingly.

Figure 2.5.2-2 – Automated Action Detail Edit Mode

2.5.3 Description of Changes

Implement a **Medical Condition: Exemption for 11 Months** Automated Action. 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. **Medical Condition: Exemption for 11 Months**

a. Action Information

- i. Name: **Medical Condition: Exemption for 11 Months**
- ii. Type: Create Task
- iii. Status: Inactive
- iv. Program(s): RE, WT
- v. Run Date: 1st day of each month(Mon-Sat)
- vi. Source: Batch

vii. Scenario: A Medical Condition exemption has a Begin Date that is 11 or more months in the past and an End Date has not been entered.

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: A Medical Condition exemption has a Begin Date that is 11 or more months in the past and an End Date has not been entered. Review and update the Medical Condition End Date accordingly.

2.5.4 Page Validations

N/A

2.5.5 Page Location

Automated Action Detail Page:

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

2.5.6 Security Updates

N/A

2.5.7 Page Mapping

N/A

2.5.8 Accessibility

The following accessibility enhancements have been identified:

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

2.5.9 Page Usage/Data Volume Impacts

N/A

2.6 Work Registration: Exempt for 11 Months Automated Action Batch Job

2.6.1 Overview

This section describes the behavior of a new batch process that will invoke the “Work Registration: Exempt for 11 Months” Automated Action.

2.6.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the “Work Registration: Exempt for 11 Months” Automated Action.

The batch processing will confirm that the participant is in a WTW or REP program that is NOT in a 'Deregistered' status. Processing will also evaluate the Work Registration Detail page of the participant for entries with a Type of 'WTW' or 'REP' that are 'Exempt' with a Status Reason of 'Disabled (EDBC determined)', 'Physically/Mentally Incapacitated', and 'SSDI (EDBC determined)' and the current date is the current date is 11 or more months from the Begin Date and the Work Registration entry does not have an End Date.

If a Task exists for the Case/Program in an Assigned or In-Process Status that originated from this Automated Action, a new Task will not be created.

2.6.3 Execution Frequency

The batch job will be scheduled to the first day of each month.

2.6.4 Key Scheduling Dependencies

None.

2.6.5 Counties Impacted

All CalSAWS Counties.

2.6.6 Category

Non-Core.

2.6.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.6.8 Failure Procedure/Operational Instructions

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

2.7 **Medical Condition: Exemption for 11 Months** Automated Action Batch Job

2.7.1 Overview

This section describes the behavior of a new batch process that will invoke the "**Medical Condition: Exemption for 11 Months**" Automated Action.

2.7.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the "**Medical Condition: Exemption for 11 Months**" Automated Action.

The batch processing will confirm that the participant is in a WTW or REP program that is NOT in a 'Deregistered' status. Processing will also evaluate the Medical Condition Detail page of the participant for entries which have a Medical Condition type of 'Incapacity – Verifiable and at least 30 days', 'SP-DDSD Blind', 'SP-DDSD Disabled', 'SSA Disabled', 'SSA Blind', 'SSI Blind'. The Batch will also evaluate the Begin Dates of the records which are 11 or more months from the current date with no 'End Date'.

If a Task exists for the Case/Program in an Assigned or In-Process Status that originated from this Automated Action, a new Task will not be created.

2.7.3 Execution Frequency

The batch job will be scheduled to the first day of each month.

2.7.4 Key Scheduling Dependencies

None.

2.7.5 Counties Impacted

All CalSAWS Counties.

2.7.6 Category

Non-Core.

2.7.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.7.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.28.2.5	The LRS shall include table-driven values for work participation program and Cal-Learn case management, as specified by COUNTY, that are maintainable by COUNTY specified Users without technical skills, including: a. Work participation program component(s); b. Cal-Learn program component(s); c. Activity statuses; d. Activity reasons; e. Exemptions; f. Non-compliance reasons; g. Good cause reasons; h. Employment situations; i. Employment history; j. Education information, including educational level, status, and grade point average; and k. Deferral	This SCR will assist users with maintaining WTW and REP exemptions by informing them of the expected end of an exemption and running batch EDBC when the exemption is ended.

4 OUTREACH

4.1 Lists

List Name: List of Cases with Disabled WTW/REP Participant

List Criteria: Cases with participants that meet the following criteria:

- Active on CW or RCA program
- Have a high dated or future end dated (greater than current system date) active Medical Condition record with the following medical condition types:
 - 'Incapacity-Verifiable and at Least 30 days'
 - 'SP-DDSD Blind'
 - 'SP-DDSD Disabled'
 - 'SSA Disabled'
 - 'SSA Blind'
 - 'SSI Blind'
- Have a high dated Work Registration with the following values:
 - Status is 'Exempt'
 - Type is 'WTW' or 'REP'
 - Status Reason is 'Disabled (EDBC determined)' or 'SSDI (EDBC determined)'

Standard Columns:

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

Additional Column(s):

- Program Code
- Participant Name (Last Name, First Name)
- Medical Condition Type
- Medical Condition Begin Date
- Medical Condition End Date (**Note:** Can be blank if high dated)
- Exempt Work Registration Status Reason
- Exempt Work Registration Begin Date
- Exempt Work Registration Expected End Date (**Note:** Can be blank if high dated)
- WTW/REP Program Worker Office Name
- WTW/REP Program Worker ID

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-204905