

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-265301

Cal-OAR File County Preview

CalSAWS	DOCUMENT APPROVAL HISTORY	
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1 OVERVIEW

The purpose of this SCR is to provide the counties a preview of the Cal-OAR (CalWORKs Outcomes and Accountability Review) data for them to be able to review before it gets submitted to the state. Currently, the Cal-OAR file is sent to the state and is not seen by the counties, which counties have requested the ability to preview their data before submission. This SCR creates 3 brand new monthly reports in which counties can access to review the data: Cal-OAR County Monthly Preview Report, Cal-OAR County Quarterly Preview Report and Cal-OAR County Semi-Annual Preview Report.

These reports contain details on how the state and CWDs are performing overtime and consists of 3 main components: Performance Measures, CalWORKs County self-assessment (Cal-CSA) process and County CalWORKs system improvement Plan (Cal-SIP).

1.1 Current Design

The counties currently do not have a way to review the data for Cal-OAR prior to the file submission to CDSS.

1.2 Requests

Implement 3 new reports that would allow the counties to have the ability to review the Cal-OAR data prior to submission to CDSS for quality assurance.

1.3 Overview of Recommendations

1. Create 3 new scheduled monthly reports:
 - a. Cal-OAR County Monthly Preview Report
 - b. Cal-OAR County Quarterly Preview Report
 - c. Cal-OAR County Semi-Annual Preview Report

1.4 Assumptions

1. There are currently queries for the data files that get submitted to the State. The logic from these queries will be used as a baseline reference for developing these reports.
 - a. Note: Some queries are changing based on 24.05 release (SCRs: CA-265237, CA-268946, CA-270826). The developer for this report will work with the developer of the three SCRs listed above to incorporate the corresponding changes in the new Cal-OAR County Monthly Preview Report, Cal-OAR County Quarterly Preview Report and Cal-OAR County Semi-Annual Preview Report.
 - i. CA-265237
 1. Update the logic for the "Attendance Hours" column in Cal-OAR County Monthly Preview Report, CalOAR19B sheet.
 - ii. CA-268946

1. Update the logic for the "Enrolled in Any Approved Education or Training Activity or Program" column in Cal-OAR County Quarterly Preview Report, CalOAR19D sheet.
- iii. CA-270826
 1. Update the logic for "Granted Aid and Required to Complete OCAT/Appraisal" column in Cal-OAR County Monthly Preview Report, CalOAR19A sheet.
 2. Update the logic for "Completed OCAT/Appraisal within 30 days after Aid is Granted" column in Cal-OAR County Monthly Preview Report, CalOAR19A sheet.
 3. Update the logic for "WTW Program Status" column in Cal-OAR County Monthly Preview Report, CalOAR19A sheet only.
2. Based on previous defect for data file (CA-271281), the volume of data may consist of more records of data that one single Excel sheet may be able to handle. The developer will implement pagination logic to handle the scenario when the rows of data exceed the limit for a single Excel sheet to continue the data into a new Excel sheet.
3. The data file that is sent to CDSS has additional columns, which are not included in the three new preview reports:
 - a. Date of Birth
 - b. Sex
 - c. Gender Identity
 - d. Sexual Orientation
 - e. Race and/or ethnicity
 - f. Spoken Language
 - g. Educational Completion Type

2 RECOMMENDATIONS

2.1 Cal-OAR County Monthly Preview Report

2.1.1 Overview

Implement a new monthly scheduled Cal-OAR County Monthly Preview Report. This report is for the monthly version of the data files: CalOAR19, CalOAR19A and CalOAR19B.

2.1.2 Cal-OAR County Monthly Preview Report Mockup

CalSAWS Cal-OAR County Monthly Preview Report														
Los Angeles														
Run Date: JAN-01-24 02:50 PM														
Reporting Period: 10/2023-12/2023														
CalOAR19														
Submission Date	Reporting Month	Case Number	Client ID Number	MEDS Primary Aid Code	Non-MOE Aid Code Reason	Program Entry Date	Program Exit Date	Single-Parent AU Type	WTW Program Status	WTW Sanction with Reduction in Aid	Ancillary Services Need Indicated	Ancillary Services Received	Scheduled to Attend Orientation	Attended Orientation

Figure 2.1.1 – CalOAR19 Sheet

CalSAWS Cal-OAR County Monthly Preview Report																			
Los Angeles																			
Run Date: JAN-01-24 02:50 PM																			
Reporting Period: 10/2023-12/2023																			
CalOAR19A																			
Submission Date	Reporting Month	Case Number	Client ID Number	MEDS Primary Aid Code	Non-MOE Aid Code Reason	Program Entry Date	Program Exit Date	Single-Parent AU Type	WTW Program Status	WTW Sanction with Reduction in Aid	Sanction Resolved with Aid Restored	HA Requested	HA Receipt within 30 days of HA Request	HSP Referral	HSP Receipt within 30 days of HSP Referral	Granted Aid and Complete OCAT/Appraisal	Completed OCAT/Appraisal within 30 days after Aid is granted	Completed OCAT/Appraisal	Scheduled for Next Activity

Figure 2.1.2 – CalOAR19A Sheet

CalSAWS Cal-OAR County Monthly Preview Report																		
Los Angeles																		
Run Date: JAN-01-24 02:50 PM																		
Reporting Period: 07/2023-12/2023																		
CalOAR19B																		
Submission Date	Reporting Month	Case Number	Client ID Number	MEDS Primary Aid Code	Non-MOE Aid Code Reason	Program Entry Date	Program Exit Date	Single-Parent AU Type	WTW Program Status	HVI Participant	HVI Offered	FS Case	FS Case Exit that Transitioned to WTW	Attendance Hours	Scheduled to Participate in First Activity	Participated in First Activity	WTW Eligible Home Visiting Participants who Finished Participation and any Exemptions	WTW Eligible Former HVI Participants with Verified Participation in WTW

Figure 2.1.3 – CalOAR19B Sheet

2.1.3 Description of Change


1. Implement a new monthly scheduled Cal-OAR County Monthly Preview Report
2. The base population of the report is for all current CalWORKs recipients that have program person statuses of Active, Ineligible or Pending and has role of Member or 'Financially Responsible – Excluded' for the report month including CalWORKs recipients that exit CalWORKs within the measurement period. This report does an additional check on event that happened before the end of the report period and if the

event type is Approved, Rescind Approved (Denial) or Rescind Approved (Discontinued).

- I. Base population data are from the following tables:
 - i. PGM_PERS
 - ii. PGM_PERS_DETL
 - iii. PGM
 - iv. CASE
 - v. PERS_APP
 - vi. PERS_APP_EVENT
 - vii. EVENT
- II. There are a total of 3 new sheets for this report:
 - i. CalOAR19
 - This sheet includes whether if current CalWORKs recipients need Ancillary Services and/or whether if they have received Ancillary Services in the measurement month.
 - ii. CalOAR19A
 - This sheet includes current CalWORKs recipients that are in an Assistance Unit that have requested Homeless Assistance and/or have been referred to the Housing Support Program during the measurement month.
 - iii. CalOAR19B
 - This sheet includes current CalWORKs recipients that are in an Assistance Unit that have been offered or participating in the Home Visiting Initiation within the measurement month.
3. The data for the report is refreshed monthly with the monthly batch. Refer to the Cal-OAR Frequencies Date Mapping (see attached in the Supporting Documents section) to see what reporting data is included for each month's generated report.
4. The Cal-OAR County Monthly Preview Report will have the following headers:

Headers

Field Name	Field Description
County Name	The County Name that the report was generated for. Format: [County Name]
Run Date	The date and time the report was run on. Format: Run Date: MON-DD-YYYY HH:MM AM/PM
Reporting Period	The reporting period is the period range that the report captured data for. This field is derived using the submission due date and run date. Each sheet should capture data that is not yet past the

	<p>submission due date and up until the month before run date.</p> <p>Reference attached excel below for more details: Monthly tab.</p> <div style="text-align: center;">  <p>Reporting Period and Submission Date Map</p> </div> <p>Format: Reporting Period: MM/YYYY-MM/YYYY</p>
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5. The report will contain the columns and sheets defined below:

CalOAR19 Sheet Column Definitions

Column Name	Column Description
Submission Date	<p>This column is the submission due date of the corresponding data file that gets submitted to the State for the reporting month. For CalOAR19, it is 3 months after the measurement period.</p> <p>Format: MM/DD/YYYY</p>
Reporting Month	<p>This column is the report month of the captured data.</p> <p>Format: MM/YYYY</p>
Case Number	<p>This represents the CalWORKs case number, as assigned by the county/SAWS.</p>
Client ID Number	<p>This is an alphanumeric nine-digit field that represents a unique CalWORKs client identifier.</p>
Meds Primary Aid Code	<p>This is aid code field that identifies the Assistance Unit makeup (i.e., Single-Parent Family, Two-Parent Family, etc.).</p>
Non-MOE Aid Code Reason	<p>This code identifies the case type designation of non-Maintenance of Effort cases.</p>
Program Entry Date	<p>This is the date the individual entered CalWORKs. If the individual has multiple spells of aid, report only the entry date of the most recent spell.</p> <p>Format: MM/DD/YYYY</p>
Program Exit Date	<p>For individuals who exited CalWORKs in the measurement period, this is the date the individual exited CalWORKs.</p> <p>Format: MM/DD/YYYY</p>

Column Name	Column Description
Single-Parent AU Type	For Single-Parent Assistance Units, this variable indicates the age of children within the Assistance Unit.
WTW Program Status	This is the latest Welfare-to-Work Program status of the individual as of the last day of the report month.
WTW Sanction with Reduction in Aid	<p>This variable identifies Welfare-to-Work sanctioned individuals who did or did not have a reduction in aid due to a Welfare-to-Work sanction (including those “removed from aid”).</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Ancillary Services Need Indicated	<p>This variable identifies individuals who did or did not indicate a need for ancillary services.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes Unknown N/A</p>
Ancillary Services Received	<p>This variable identifies individuals who did or did not receive ancillary services in the measurement period.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Scheduled to Attend Orientation	<p>This variable identifies individuals who were or were not scheduled to attend orientation within the measurement month.</p> <p>This column should be always populated with either of the below response options:</p> <p>No</p>

Column Name	Column Description
	Yes N/A
Attended Orientation	<p>This variable identifies individuals who did or did not complete orientation within the measurement month. The orientation activity is complete for the individual as determined by the county and the individual (i.e., the individual does not need to come back to finish the orientation; all information appropriate for the individual has been provided).</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>

CalOAR19A Sheet Column Definitions

Column Name	Column Description
Submission Date	<p>This column is the submission due date of the corresponding data file that gets submitted to the State for the reporting month. For CalOAR19A, it is 3 months after the measurement period.</p> <p>Format: MM/DD/YYYY</p>
Reporting Month	<p>This column is the report month of the captured data.</p> <p>Format: MM/YYYY</p>
Case Number	<p>This represents the CalWORKs case number, as assigned by the county/SAWS.</p>
Client ID Number	<p>This is an alphanumeric nine-digit field that represents a unique CalWORKs client identifier.</p>
Meds Primary Aid Code	<p>This is aid code field that identifies the Assistance Unit makeup (i.e., Single-Parent Family, Two-Parent Family, etc.).</p>
Non-MOE Aid Code Reason	<p>This code identifies the case type designation of non-Maintenance of Effort cases.</p>
Program Entry Date	<p>This is the date the individual entered CalWORKs. If the individual has multiple spells of aid, report only the entry date of the most recent spell.</p>

Column Name	Column Description
	Format: MM/DD/YYYY
Program Exit Date	For individuals who exited CalWORKs in the measurement period, this is the date the individual exited CalWORKs. Format: MM/DD/YYYY
Single-Parent AU Type	For Single-Parent Assistance Units, this variable indicates the age of children within the Assistance Unit.
WTW Program Status	This is the latest Welfare-to-Work Program status of the individual as of the last day of the report month.
WTW Sanction with Reduction in Aid	This variable identifies Welfare-to-Work sanctioned individuals who did or did not have a reduction in aid due to a Welfare-to-Work sanction (including those "removed from aid"). This column should be always populated with either of the below response options: No Yes N/A
Sanction Resolved with Aid Restored	This column identifies individuals who did or did not resolve (had their aid restored) their Welfare-to-Work sanction. This column should be always populated with either of the below response options: No Yes N/A
HA Requested	This column identifies individuals who did or did not request Homeless Assistance. This column should be always populated with either of the below response options: No Yes N/A

Column Name	Column Description
HA Receipt within 30 days of HA Request	<p>This column identifies individuals who did or did not receive an Homeless Assistance benefit within 30 days of their request for Homeless Assistance.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
HSP Referral	<p>This column indicates whether the individual received a Housing Support Program referral.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
HSP Receipt within 30 days of HSP Referral	<p>This column indicates that the individual did or did not receive Housing Support Program services within 30 days of their Housing Support Program referral.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Granted Aid and Required to Complete OCAT/Appraisal	<p>This column identifies individuals who were or were not granted aid in the measurement month who are required to complete an Online CalWORKs Appraisal Tool (OCAT)/appraisal. Individuals "required to complete an appraisal" includes those with a break in aid longer than six months.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Completed OCAT/Appraisal within 30 days after Aid is Granted	<p>This column identifies individuals who did or did not complete an Online CalWORKs Appraisal Tool (OCAT)/Appraisal within 30 days after aid is</p>

Column Name	Column Description
	<p>granted. The Appraisal is complete for the individual as determined by the county and the individual (i.e., the individual does not need to come back to finish the appraisal; all questions that are appropriate for the individual have been completed).</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Completed OCAT/Appraisal	<p>This column identifies individuals who did or did not complete an Online CalWORKs Appraisal Tool (OCAT)/Appraisal in the measurement month. The Appraisal is complete for the individual as determined by the county and the individual (i.e., the individual does not need to come back to finish the appraisal; all questions that are appropriate for the individual have been completed).</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Scheduled for Next Activity	<p>This column identifies individuals who were or were not scheduled for their next activity within 30 days of Online CalWORKs Appraisal Tool (OCAT)/Appraisal completion (i.e., the first approved activity scheduled after OCAT/Appraisal completion). "Scheduled" refers to when the schedule was created, not the actual date an individual is expected to attend an activity.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>

CalOAR19B Sheet Column Definitions

Column Name	Column Description
Submission Date	This column is the submission due date of the corresponding data file that gets submitted to the State for the reporting month. For CalOAR19B, it is 6 months after the measurement period. Format: MM/DD/YYYY
Reporting Month	This column is the report month of the captured data. Format: MM/YYYY
Case Number	This represents the CalWORKs case number, as assigned by the county/SAWS.
Client ID Number	This is an alphanumeric nine-digit field that represents a unique CalWORKs client identifier.
Meds Primary Aid Code	This is aid code field that identifies the Assistance Unit makeup (i.e., Single-Parent Family, Two-Parent Family, etc.).
Non-MOE Aid Code Reason	This code identifies the case type designation of non-Maintenance of Effort cases.
Program Entry Date	This is the date the individual entered CalWORKs. If the individual has multiple spells of aid, report only the entry date of the most recent spell. Format: MM/DD/YYYY
Program Exit Date	For individuals who exited CalWORKs in the measurement period, this is the date the individual exited CalWORKs. Format: MM/DD/YYYY
Single-Parent AU Type	For Single-Parent Assistance Units, this variable indicates the age of children within the Assistance Unit.
WTW Program Status	This is the latest Welfare-to-Work Program status of the individual as of the last day of the report month.
HVI Participant	This column indicates that the individual is or is not a Home Visiting Initiative program participant during the measurement period. This includes the child(ren) within the Assistance Unit of a Home Visiting Initiative participant.

Column Name	Column Description
	<p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
HVI Offered	<p>This column identifies individuals who were or were not offered Home Visiting Initiative home visits in the measurement period. This includes the child(ren) within the Assistance Unit of an Home Visiting Initiative participant.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
FS Case Exit	<p>This column indicates whether the Family Stabilization case exited the Family Stabilization Program in the measurement month. An individual has exited the Family Stabilization program when they are referred to the Welfare-to-Work program from Family Stabilization program participation (for any reason).</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
FS Case that Transitioned to WTW	<p>This column indicates whether a former Family Stabilization case transitioned to Welfare-to-Work and participated (actual, verified attendance hours) in an approved activity within three months of their Family Stabilization exit date. An individual has exited the Family Stabilization program when they are referred to the Welfare-to-Work program from Family Stabilization program participation (for any reason).</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes</p>

Column Name	Column Description
	N/A
Attendance Hours	The column reports an individual's total monthly hours of attendance in any approved activity. This variable utilizes actual, verified attendance hours; not scheduled hours.
Scheduled to Participate in First Activity	<p>This column identifies individuals who were or were not scheduled to participate in their first Welfare-to-Work or Family Stabilization plan activity in the measurement month. This only applies to the first Welfare-to-Work or Family Stabilization plan a participant signs (per spell of aid), not any subsequent plans.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Participated in First Activity	<p>This column identifies individuals who did or did not participate (with actual, verified attendance hours) in their first Welfare-to-Work or Family Stabilization plan activity in the measurement month. This only applies to the first Welfare-to-Work or Family Stabilization plan a participant signs (per spell of aid), not any subsequent plans.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
WTW Eligible Home Visiting Participants who Finished Participation and any Exemptions	This column reports Welfare-to-Work individuals who did or did not complete their Home Visiting Initiative participation and any exemptions within the measurement period. Participation in the Home Visiting program is complete for the individual once they have finished (or left) the program, after either successful completion or unsuccessful completion, as defined within the specific home visiting model.

Column Name	Column Description
	<p>This column should be always populated with either of the below response options:</p> <p>No</p> <p>Yes</p> <p>N/A</p>
<p>WTW Eligible Former HVI Participants with Verified Participation in WTW</p>	<p>This column identifies home visiting participants who did or did not transition to participation (actual, verified attendance hours) in an approved Welfare-to-Work activity within three months of completing Home Visiting Initiative participation and any exemptions. Home visiting participants include individuals who received at least one home visit, not including instances where home visits were attempted, but not completed.</p> <p>This column should be always populated with either of the below response options:</p> <p>No</p> <p>Yes</p> <p>N/A</p>

2.1.4 Report Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Administrative
- **Description:** Provides the preview of the upcoming monthly data for CalOAR19, CalOAR19A and CalOAR19B data files before sending the file submission to the state. This report is generated monthly for upcoming submission periods that have not passed yet.

2.1.5 Counties Impacted

- All CalSAWS counties will be impacted by the changes in this SCR.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CalOARCountyMonthlyPreviewReport	This right gives access to view the Cal-OAR County Monthly Preview Report	Cal-OAR County Monthly Preview Report

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Cal-OAR County Monthly Preview Report	This group gives access to view the Cal-OAR County Monthly Preview Report	<ul style="list-style-type: none"> View Only System Administrator

2.1.7 Page Usage/Performance

It is anticipated that this report will be accessed monthly.

2.2 Cal-OAR County Quarterly Preview Report

2.2.1 Overview

Implement a new monthly Scheduled Cal-OAR County Quarterly Preview Report. This report is for the quarterly version of the data files: CalOAR19C and CalOAR19D.

2.2.2 Cal-OAR County Quarterly Preview Report Mockup

CalSAWS Cal-OAR County Quarterly Preview Report											
Los Angeles											
Run Date: JAN-01-24 02:50 PM											
Reporting Period: 07/2023-12/2023											
CalOAR19C											
Submission Date	Reporting Quarter	Case Number	Client ID Number	MEDS Primary Aid Code	Non-MOE Aid Code Reason	Program Entry Date	Program Exit Date	Single-Parent AU Type	WTW Program Status	Granted Aid in Previous Quarter	Received at Least One Transportation Service

Figure 2.1.1 – CalOAR1C Sheet

CalSAWS Cal-OAR County Quarterly Preview Report															
Los Angeles															
Run Date: JAN-01-24 02:50 PM															
Reporting Period: 10/2023-12/2023															
CalOAR19D															
Submission Date	Reporting Quarter	Case Number	Client ID Number	MEDS Primary Aid Code	Non-MOE Aid Reason	Program Entry Date	Program Exit Date	Single-Parent AU Type	WTW Program Status	Enrolled in Any Approved Education or Training Activity or Program	Completed an Education or Training Program	Subsidized Employment [SE] Exit Date	Subsidized Employment [SE] Entry Date	Unsubsidize Employment within Three Quarters	WTW Individuals who Exited CalWORKs


Figure 2.1.2 – CalOAR19D Sheet

2.2.3 Description of Change

1. Implement a new monthly Scheduled Cal-OAR County Quarterly Preview Report
2. The base population of the report is for all current CalWORKs recipients that have program person statuses of Active, Ineligible or Pending and has role of Member or 'Financially Responsible – Excluded' for the report month including CalWORKs recipients that exit CalWORKs within the measurement period.
 - a. Base population data are from the following tables:
 - i. PGM_PERS
 - ii. PGM_PERS_DETL
 - iii. PGM
 - iv. CASE
 - b. There are a total of 2 new data sheets for this report:
 - i. CalOAR19C
 1. This sheet includes whether if current CalWORKs recipients received aid in previous quarter and/or whether if they have received transportation services in the measurement period.
 - ii. CalOAR19D
 1. This sheet includes whether if current CalWORKs recipients are enrolled or completed Education/Training Programs, if they have exited Subsidized Employment and transitioned to Unsubsidized Employment within 3 quarter, and/or if Welfare-to-Work individuals have exited CalWORKs in the measurement period.
3. The data for the report is refreshed monthly with the monthly batch. Refer to the Cal-OAR Frequencies Date Mapping (see attached in the Supporting Documents section) to see what reporting data is included for each month's generated report.
4. The Cal-OAR County Quarterly Preview Report will have the following headers:

Headers

Field Name	Field Description
------------	-------------------

County Name	The County Name that the report was generated for. Format: [County Name]
Run Date	The date and time the report was run on. Format: Run Date: MON-DD-YYYY HH:MM AM/PM
Reporting Period	The reporting period is the period range that the report captured data for. This field is derived using the submission due date and run date. Each sheet should capture data that is not yet past the submission due date and up until the month before run date. Reference attached excel below for more details: Quarterly tab.  Reporting Period and Submission Date Map Format: Reporting Period: MM/YYYY-MM/YYYY

5. The report will contain the columns and sheets defined below:

CalOAR19C Sheet Column Definitions

Column Name	Column Description
Submission Date	This column is the submission due date of the corresponding data file that gets submitted to the State for the reporting quarter. For CalOAR19C, it is 5 months after the measurement period ends. Format: MM/DD/YYYY
Reporting Quarter	This column is the report quarter period of the captured data. Format: MM/YYYY-MM/YYYY
Case Number	This represents the CalWORKs case number, as assigned by the county/SAWS.
Client ID Number	This is an alphanumeric nine-digit field that represents a unique CalWORKs client identifier.
Meds Primary Aid Code	This is aid code field that identifies the Assistance Unit makeup (i.e., Single-Parent Family, Two-Parent Family, etc.).

Column Name	Column Description
Non-MOE Aid Code Reason	This code identifies the case type designation of non-Maintenance of Effort cases.
Program Entry Date	This is the date the individual entered CalWORKs. If the individual has multiple spells of aid, report only the entry date of the most recent spell. Format: MM/DD/YYYY
Program Exit Date	For individuals who exited CalWORKs in the measurement period, this is the date the individual exited CalWORKs. Format: MM/DD/YYYY
Single-Parent AU Type	For Single-Parent Assistance Units, this variable indicates the age of children within the Assistance Unit.
WTW Program Status	This is the latest Welfare-to-Work Program status of the individual as of the last day of the report month.
Granted Aid in Previous Quarter	This column identifies individuals who were or were not granted aid in the previous quarter. This column should be always populated with either of the below response options: No Yes
Received at Least One Transportation Service	This column identifies individuals who did or did not receive at least one transportation service within one quarter of aid being granted. Transportation receipt is based on the date of issuance. This column should be always populated with either of the below response options: No Yes N/A

CalOAR19D Sheet Column Definitions

Column Name	Column Description
Submission Date	This column is the submission due date of the corresponding data file that gets submitted to the

Column Name	Column Description
	State for the reporting quarter. For CalOAR19D, it is 2 months after the measurement period ends. Format: MM/DD/YYYY
Reporting Quarter	This column is the report quarter period of the captured data. Format: MM/YYYY-MM/YYYY
Client ID Number	This is an alphanumeric nine-digit field that represents a unique CalWORKs client identifier.
Case Number	This represents the CalWORKs case number, as assigned by the county/SAWS.
Meds Primary Aid Code	This is aid code field that identifies the Assistance Unit makeup (i.e., Single-Parent Family, Two-Parent Family, etc.).
Non-MOE Aid Code Reason	This code identifies the case type designation of non-Maintenance of Effort cases.
Program Entry Date	This is the date the individual entered CalWORKs. If the individual has multiple spells of aid, report only the entry date of the most recent spell. Format: MM/DD/YYYY
Program Exit Date	For individuals who exited CalWORKs in the measurement period, this is the date the individual exited CalWORKs. Format: MM/DD/YYYY
Single-Parent AU Type	For Single-Parent Assistance Units, this variable indicates the age of children within the Assistance Unit.
WTW Program Status	This is the latest Welfare-to-Work Program status of the individual as of the last day of the report month.
Enrolled in Any Approved Education or Training Activity or Program	This column identifies individuals who were or were not enrolled in any approved education or training activity or program in the measurement quarter. This column should be always populated with either of the below response options: No Yes

Column Name	Column Description
	N/A
Completed an Education or Training Program	<p>This column identifies individuals who did or did not complete an education or training program while receiving CalWORKs assistance.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Subsidized Employment (SE) Exit Date	<p>This column identifies the Subsidized Employment exit date.</p> <p>Format: MM/DD/YYYY</p>
Subsidized Employment (SE) Entry Date	<p>This column reports the date individuals entered Subsidized Employment.</p> <p>Format: MM/DD/YYYY</p>
Unsubsidized Employment within Three Quarters	<p>This column identifies individuals who did or did not transition to unsubsidized employment within three quarters after exiting Subsidized Employment.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
WTW Individuals who Exited CalWORKs	<p>This column identifies individuals who did or did not exit CalWORKs within the measurement period.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>

2.2.4 Report Location

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

- **Description:** Provides the preview of the upcoming quarterly data for CalOAR19C and CalOAR19D data files before sending the file submission to the state. This report is generated monthly for upcoming submission periods that have not passed yet.

2.2.5 Counties Impacted

- All CalSAWS counties will be impacted by the changes in this SCR.

2.2.6 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
CalOARCountyQuarterlyPreviewReport	This right gives access to view the Cal-OAR County Quarterly Preview Report	Cal-OAR County Quarterly Preview Report

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Cal-OAR County Quarterly Preview Report	This group gives access to view the Cal-OAR County Quarterly Preview Report	<ul style="list-style-type: none"> • View Only • System Administrator

2.2.7 Page Usage/Performance

It is anticipated that this report will be accessed monthly.

2.3 Cal-OAR County Semi-Annual Preview Report

2.3.1 Overview

Implement a new monthly Scheduled Cal-OAR County Semi-Annual Preview Report. This report is for the semi-annual version of the data file: CalOAR19E.

2.3.2 Cal-OAR County Semi-Annual Preview Report Mockup

CalSAWS Cal-OAR County Semi-Annual Preview Report														
Los Angeles														
Run Date: JAN-01-24 02:50 PM														
Reporting Period: 07/2023-12/2023														
CalOAR19E														
Submission Date	Reporting Semi-Annual Period	Case Number	Client ID Number	MEDS Primary Aid Code	Non-MOE Aid Code Reason	Program Entry Date	Program Exit Date	Single-Parent AU Type	WTW Program Status	Child Care Need Indicated	Stage One Child Care Received	Eligible for Child Care	Former WTW Individuals who Participated in Education while on CalWORKs	Former WTW Individuals who Completed Education


Figure 2.1.1 – CalOAR1E Sheet

2.3.3 Description of Change

1. Implement a new monthly Scheduled Cal-OAR County Semi-Annual Preview Report
2. The base population of the report is for all current CalWORKs recipients that have program person statuses of Active, Ineligible or Pending and has role of Member or 'Financially Responsible – Excluded' for the report month including CalWORKs recipients that exit CalWORKs within the measurement period.
 - a. Base population data are from the following tables:
 - i. PGM_PERS
 - ii. PGM_PERS_DETL
 - iii. PGM
 - iv. CASE
 - b. There is 1 new data sheet for this report:
 - i. CalOAR19E
 1. This sheet includes whether if current CalWORKs recipients need/received/are eligible for Child Care and/or if they are former Welfare-to-Work individuals that have participated/completed Education while on CalWORKs in the measurement period.
3. The data for the report is refreshed monthly with the monthly batch. Refer to the Cal-OAR Frequencies Date Mapping (see attached in the Supporting Documents section) to see what reporting data is included for each month's generated report.
4. The Cal-OAR County Semi-Annual Preview Report will have the following headers:

Headers

Field Name	Field Description
County Name	The County Name that the report was generated for. Format: [County Name]
Run Date	The date and time the report was run on. Format: Run Date: MON-DD-YYYY HH:MM AM/PM

Reporting Period	<p>The reporting period is the period range that the report captured data for. This field is derived using the submission due date and run date. Each sheet should capture data that is not yet past the submission due date and up until the month before run date.</p> <p>Reference attached excel below for more details: Semi-Annual tab.</p> <div style="text-align: center;">  <p>Reporting Period and Submission Date Map</p> </div> <p>Format: Reporting Period: MM/YYYY-MM/YYYY</p>
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5. The report will contain the columns and sheets defined below:

CalOAR19E Sheet Column Definitions

Column Name	Column Description
Submission Date	<p>This column is the submission due date of the corresponding data file that gets submitted to the State for the reporting Semi-Annual period. For CalOAR19E, it is 2 months after the measurement period ends.</p> <p>Format: MM/DD/YYYY</p>
Reporting Semi-Annual Period	<p>This column is the report Semi-Annual period of the captured data.</p> <p>Format: MM/YYYY-MM/YYYY</p>
Case Number	<p>This represents the CalWORKs case number, as assigned by the county/SAWS.</p>
Client ID Number	<p>This is an alphanumeric nine-digit field that represents a unique CalWORKs client identifier.</p>
Meds Primary Aid Code	<p>This is aid code field that identifies the Assistance Unit makeup (i.e., Single-Parent Family, Two-Parent Family, etc.).</p>
Non-MOE Aid Code Reason	<p>This code identifies the case type designation of non-Maintenance of Effort cases.</p>
Program Entry Date	<p>This is the date the individual entered CalWORKs. If the individual has multiple spells of aid, report only the entry date of the most recent spell.</p> <p>Format: MM/DD/YYYY</p>

Column Name	Column Description
Program Exit Date	<p>For individuals who exited CalWORKs in the measurement period, this is the date the individual exited CalWORKs.</p> <p>Format: MM/DD/YYYY</p>
Single-Parent AU Type	<p>For Single-Parent Assistance Units, this variable indicates the age of children within the Assistance Unit.</p>
WTW Program Status	<p>This is the latest Welfare-to-Work Program status of the individual as of the last day of the report month.</p>
Child Care Need Indicated	<p>This column identifies individuals who did or did not indicate they have a need for child care.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes Unknown N/A</p>
Stage One Child Care Received	<p>This column identifies individuals who did or did not receive subsidized child care services. Receiving Stage One Child Care means that benefits are approved, authorized, or certified after an eligibility determination is made that authorizes subsidized child care reimbursements, irrespective of actual child care reimbursements.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Eligible for Child Care	<p>This column identifies individuals who were or were not eligible for child care.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>

Column Name	Column Description
Former WTW Individuals who Participated in Education while on CalWORKs	<p>This column identifies individuals who did or did not participate in education while on CalWORKs assistance and who exited CalWORKs in the measurement period.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>
Former WTW Individuals who Completed Education	<p>This column identifies individuals who did or did not complete an educational diploma, certificate, or equivalent while receiving CalWORKs assistance.</p> <p>This column should be always populated with either of the below response options:</p> <p>No Yes N/A</p>

2.3.4 Report Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Administrative
- **Description:** Provides the preview of the upcoming semi-annual data for CalOAR19E data files before sending the file submission to the state. This report is generated monthly for upcoming submission periods that have not passed yet.

2.3.5 Counties Impacted

- All CalSAWS counties will be impacted by the changes in this SCR.

2.3.6 Security Updates

5. Security Rights

Security Right	Right Description	Right to Group Mapping
CalOARCountySemiAnnualPreviewReport	This right gives access to view the Cal-OAR County Semi-Annual Preview Report	Cal-OAR County Semi-Annual Preview Report





6. Security Groups




Security Group	Group Description	Group to Role Mapping
Cal-OAR County Semi-Annual Preview Report	This group gives access to view the Cal-OAR County Semi-Annual Preview Report	<ul style="list-style-type: none"> View Only System Administrator

2.3.7 Page Usage/Performance

It is anticipated that this report will be accessed monthly.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Cal-OAR County Monthly Preview Report Mockup	 Cal-OAR County Monthly Preview Repc
2	Reports	Cal-OAR County Monthly Preview Report - Security Matrix	 Security Matrix - Cal-OAR County Mont
3	Reports	Cal-OAR County Quarterly Preview Report Mockup	 Cal-OAR County Quarterly Preview Rep
4	Reports	Cal-OAR County Quarterly Preview Report - Security Matrix	 Security Matrix - Cal-OAR County Quar

5	Reports	Cal-OAR County Semi-Annual Preview Report Mockup	 Cal-OAR County Semi-Annual Preview I
6	Reports	Cal-OAR County Semi-Annual Preview Report - Security Matrix	 Security Matrix - Cal-OAR County Semi
7	Reports	Cal-OAR Frequencies Date Mapping	 Reporting Period and Submission Date Map

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
1407	The CalSAWS shall include the ability to generate the following parameter-driven reports: a. Fraud reports; b. Hearing reports; c. Financial reports; d. Federal and State claiming reports; e. Caseload Activity Report (CAR); f. Personnel management reports; h. Benefit authorization reports; i. Issuance reports; j. Collection reports; k. QC reports; l. Mass update reports; m. Interface reports; n. Error reports; o. Caseload management reports; p. Performance-based criteria reports; q. Case CalSAWS Data reports; and r. Control and processing reports. - Reporting - 2.24.2.8	The Cal-OAR County Monthly Preview Report, Cal-OAR County Quarterly Preview Report and Cal-OAR County Semi-Annual Preview Report would provide data available to the county.

4.2 Migration Requirements

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

5 APPENDIX

N/A