

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-252813

ACL 23-20 Update the CF 385 Application for Disaster
CalFresh

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Priya Sridharan, Himanshu Jain, Caroline Bui

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/09/2024	1.0	Initial Draft	Justin Bourbonniere
01/12/2024	1.1	BA Review Feedback - Update State version from 01/24 to 01/24.	Justin Bourbonniere
02/08/2024	1.2	Added English to updated languages. Updated attached documents from translations.zip to mockups.zip	Justin Bourbonniere
03/04/2024	Content Revision 1	Threshold languages moved to SCR CA-274970 per P Madhan Kumar	Justin Bourbonniere

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1 OVERVIEW

This effort will be to update CF 385 Application for Disaster CalFresh to the latest state version 01/24.

1.1 Current Design

The system has CF 385 Application for Disaster CalFresh 10/15 version.

1.2 Requests

Update CF 385 Application for Disaster CalFresh to the latest state version 01/24.

1.3 Overview of Recommendations

1. Update CF 385 Application for Disaster CalFresh to the latest state version 01/24 including threshold languages (English, Spanish).

1.4 Assumptions

1. There are no other changes to the form's generation conditions or variable population logic, unless otherwise stated in this design document.
2. CF 385 is not associated with a batch trigger or online page. CF 385 is available only through the template repository.
3. CF 385 only has print local enabled.
4. CF 385 populates the Case # and Worker name on County Use Section.
5. CF 385 E-Signature (IVR & Telephonic) functionality is already enabled.
6. CF 385 BenefitsCal impacts will be handled with SCR CA-256387.
7. The six new threshold languages (Hindi, Japanese, Mien, Punjabi, Thai, Ukrainian) for CF 385 Application for Disaster CalFresh will be updated to the 01/24 version in a future SCR CA-271664.
8. Threshold languages Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog, Vietnamese will be handled by SCR CA-274970.

2 RECOMMENDATIONS

2.1 Update CF 385 to the latest state version.

2.1.1 Overview

Update CF 385 Application for Disaster CalFresh to the latest state version 01/24 including threshold languages (English, Spanish).

State Form: CF 385 (10/15)

Current Programs: Disaster CalFresh (DC)

Current Attached Form(s): None

Current Forms Category: Form

Current Template Repository Visibility: All counties

Existing Languages: English, Spanish

2.1.2 Form/NOA Verbiage

Update CF 385 Application for Disaster CalFresh to the latest state version 01/24.

Updated Languages: English, Spanish

Form Header: n/a

Form Title:

- **Title listed on Template Repository/Document List page:** CF 385 - Application For Disaster CalFresh
- **Title printed on the Form:** CF 385 - Application For Disaster CalFresh

Form Number: CF 385

Template Repository Visibility: All counties

Include NA Back 9: N

- **Includes standard NA Back 9 variable population:** N

Imaging Form Name: Application For Disaster CF

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

Location	Existing Text	Updated Text
Moved from header to form body (moved below double solid line)	Disaster Benefit Period: _____ to COUNTY USE ONLY Case Number _____ Worker _____ Date Received _____	Disaster Benefit Period: _____ to COUNTY USE ONLY Case Number _____ Worker _____ Date Received _____
This section expanded to fit the whole page. Previous version	YOUR RIGHTS AS AN APPLICANT OR RECIPIENT:	YOUR RIGHTS AS AN APPLICANT OR RECIPIENT:

(10/15) has a two-column format.		
First bullet point under “Your Right as an Applicant or Recipient” section	To be served without regard to race, color, national origin, religion, political affiliation, sex, disability, or age, and to file a complaint if you feel you have been discriminated against.	To be served without regard to race, color, national origin, religion, political affiliation, sex, disability, or age, and to file a complaint if you feel you have been discriminated against.
Bullet point added as last bullet point in the “Your Right as an Applicant or Recipient” section		<ul style="list-style-type: none"> You can authorize someone to apply for, receive, or use your Disaster CalFresh benefits. If you would like to authorize someone, complete the information in the section below.
Table Added below “Your Right as an Applicant or Recipient” section		Name of Authorized Representative Telephone Number Address Including City and Zip Code Apply for Disaster CalFresh Pick Up EBT Card Purchase Food for Household
This section expanded to fit the whole page. Previous version (10/15) has a two-column format.	YOUR RESPONSIBILITIES AS AN APPLICANT OR RECIPIENT:	YOUR RESPONSIBILITIES AS AN APPLICANT OR RECIPIENT:
First bullet point in the “Your Responsibilities as an applicant or recipient” section	Answer the questions truthfully and completely, the best you can. If you refuse to provide any of the needed information, you will not get Disaster CalFresh benefits.	Answer the questions truthfully and completely, the best you can.
Second bullet point in the “Your Responsibilities as an applicant or recipient” section	At your interview, you must verify the identity of the head of household, the identity of the person completing the application, and if possible, proof of the household's residence and/or work address at the time of the disaster.	At your interview, you must verify the identity of the head of household, the identity of the person completing the application, and if possible, proof of the household's residence and/or work address at the time of the disaster. If you refuse to provide any of the needed information, you will not get Disaster CalFresh benefits.

Third bullet point in the "Your Responsibilities as an applicant or recipient" section	You must cooperate with county, state and federal staff if you are selected for a review after the disaster period.	You must cooperate with county, state, and federal staff if you are selected for a review after the disaster period.
Fourth bullet point in the "Your Responsibilities as an applicant or recipient" section. This text is removed from 001/24 version.	You can authorize someone to receive, or use your Disaster CalFresh benefits. If you would like to authorize someone, complete the information below: NAME OF AUTHORIZED REPRESENTATIVE TELEPHONE NUMBER ADDRESS INCLUDING CITY AND ZIP CODE PICK UP EBT CARD ONLY PICKUP EBT CARD TO PURCHASE FOOD FOR HOUSEHOLD	
This section expanded to fit the whole page. Previous version (10/15) has a two-column format.	PENALTY WARNING!!	PENALTY WARNING!!
Paragraph under "PENALTY WARNING!!" section	Failing to report information or misrepresentation of facts can result in legal prosecution with penalties of a fine, imprisonment or both.	Intentionally failing to report information or misrepresentation of facts can result in legal prosecution with penalties of a fine, imprisonment or both.
Second bullet point under "PENALTY WARNING!!" section	Do not trade or sell your Disaster CalFresh benefits, or any other issuance device	Do not trade or sell your Disaster CalFresh benefits, or any other issuance device.
New section below "PENALTY WARNING!!" section		Do Not Send Applications Here NON-DISCRIMINATION STATEMENT: In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), religious creed, disability, age, political beliefs, or reprisal or retaliation for prior civil rights activity.

		<p>Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the agency (state or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339.</p> <p>To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA</p> <p>Program Discrimination Complaint Form which can be obtained online at: https://www.usda.gov/sites/default/files/documents/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.pdf, from any USDA office, by calling (833) 620-1071, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to:</p>
New section. This portion is formatted in a two-column format.		<p>1. Mail Food and Nutrition Service, USDA 1320 Braddock Place, Room 334 Alexandria, VA 22314; or</p>

		<p>2. Fax (833) 256-1665 or (202) 690-7442; or</p> <p>3. Email FNSCIVILRIGHTSCOMPLAINTS@usda.gov</p> <p>This institution is an equal opportunity provider.</p> <p>CDSS Civil Rights Bureau P.O.BOX 944243, M.S. 9-7-041 Sacramento, CA 94244-2430</p> <p>Do Not Send Applications Here</p>
Instructions Section, above "PART A – HOUSEHOLD SITUATION"	INSTRUCTIONS: Please complete the questions on this form for your expected circumstances during the disaster benefit period shown above	INSTRUCTIONS: Please complete the questions on this form based on your circumstances during the disaster benefit period. The disaster benefit period is a 30-day period starting on the date that the disaster struck.
PART A – HOUSEHOLD SITUATION	(You must check Yes or No for each question)	(You must mark Yes or No for each question)
PART A – HOUSEHOLD SITUATION Question 1	Was anyone in your household living or working or both (check appropriate box) in the disaster area at the time of the disaster?	<p>Was anyone in your household living or working in the disaster area at the time of the disaster? YES NO</p> <p><i>Note: The disaster area is defined in the Presidential Declaration of Major Disaster with Individual Assistance.</i></p> <p>During the disaster benefit period:</p>
PART A – HOUSEHOLD SITUATION Question 2	Are you unable to get to your household's income or cash resources?	Were you unable to get to your household's income or cash resources?
PART A – HOUSEHOLD SITUATION Question 3	Have your income or cash resources been lowered, delayed or stopped because of the disaster?	Was your income or cash resources lowered, delayed, or stopped because of the disaster?
PART A – HOUSEHOLD SITUATION Question 4	Will you be buying food and preparing meals during the disaster benefit period?	Did you buy food and prepare meals?
PART A – HOUSEHOLD SITUATION Question 5	Was anyone in your household employed by _____ ?	Was anyone in your household employed by a County or State CalFresh agency?

PART B – HOUSEHOLD MEMBERS Question 5 (question # updated to 6)	5. List the names of all persons applying for Disaster CalFresh. Include only persons who were living with you at the time of the disaster. If you were temporarily staying with another household because of the disaster, do not list members of that household. * Telling your Social Security Number (SSN) is voluntary. It will be used for identification purposes only.	6. List the names of all persons applying for Disaster CalFresh. Include only persons who were living with you at the time of the disaster. If you were temporarily staying with another household because of the disaster, do not list members of that household. * Providing your Social Security Number (SSN) is voluntary. It will be used for identification purposes only.
PART C – INCOME/RESOURCES/EXPENSES Question 6 a. (question # updated to 7 a.)	What is the total amount of take home pay or other income all persons listed above have received or will get during the disaster benefit period?	What is the total amount of take-home pay or other income all persons listed above have received during the disaster benefit period?
PART C – INCOME/RESOURCES/EXPENSES Question 6 b. (question # updated to 7 b.). Line added for response area.	List all your income sources:	List all your income sources: _____
PART C – INCOME/RESOURCES/EXPENSES Question 7 (question # updated to 8)	List all cash resources the persons listed above will be able to get to during the disaster benefit period. Do not include any money listed in number 6.	List all cash resources the persons listed above will be able to get to during the disaster benefit period. Do not include any money listed in number 7.
PART C – INCOME/RESOURCES/EXPENSES Question 8 (question # updated to 9)	8. Enter the amount of expenses for losses or damages related to the disaster which you have paid or expect to pay during the disaster period. Do not list amounts which will be paid by someone who is not listed above or which will be reimbursed during the disaster period. Eligible expenses may include some of the following:	9. Enter the amount of expenses for losses or damages related to the disaster which you paid during the disaster benefit period. Do not list amounts which were paid by someone who is not listed above, or which were reimbursed during the disaster benefit period. Eligible expenses may include (but not limited to):
PART C – INCOME/RESOURCES/EXPENSES Question 8 a. (question # updated to 9 a.)	a. Expenses to repair damage to the household's home or other property essential to employment or self-employment of a household member.	a. Expenses to repair damage to the household's home or other property needed for employment or self-employment of a household member
PART C – INCOME/RESOURCES/EXPENSES Question 8 b. (question # updated to 9 b.)	Temporary shelter expenses if the home is uninhabitable or the household cannot reach it;	Temporary shelter expenses if the home is uninhabitable or the household cannot reach it

PART C – INCOME/RESOURCES/EXPENSES Question 8 c. (question # updated to 9 c.)	Expenses for moving out of the area which was evacuated due to the disaster;	Expenses for moving out of the area which was evacuated due to the disaster
PART C – INCOME/RESOURCES/EXPENSES Question 8 d. (question # updated to 9 d.)	Expenses related to protection of a home or business from disaster damage;	Expenses related to protection of a home or business from disaster damage
PART C – INCOME/RESOURCES/EXPENSES Question 8 e. (question # updated to 9 e.)	Medical expenses due to personal injury.	Medical expenses due to personal injury
PART C – INCOME/RESOURCES/EXPENSES Question 8 f. (question # updated to 9 f.)	Disaster-related funeral expenses.	Disaster-related funeral expenses
PART C – INCOME/RESOURCES/EXPENSES Question 8 g. (question # updated to 9 g.)	Disaster-related pet boarding fees.	Food loss
PART C – INCOME/RESOURCES/EXPENSES Question 8 h. (question # updated to 9 h.)	Expenses related to replacing necessary personal and household items, such as clothing, appliances, tools and education materials.	Disaster-related pet boarding fees
PART C – INCOME/RESOURCES/EXPENSES Question 8 i. (question # updated to 9 i.)	Fuel for primary heating source.	Expenses related to replacing necessary personal and household items, such as clothing, appliances, tools, and education materials
PART C – INCOME/RESOURCES/EXPENSES Question 8 j. (question # updated to 9 j.)	Clean-up items expense.	Fuel for primary heating source
PART C – INCOME/RESOURCES/EXPENSES Question 8 k. (question # updated to 9 k.)	Disaster-damaged vehicle expenses.	Clean-up items expense
PART C – INCOME/RESOURCES/EXPENSES Question 8 l. (question # updated to 9 l.)	Storage expenses.	Disaster-damaged vehicle expenses
PART C – INCOME/RESOURCES/EXPENSES		Storage expenses

Question 8 m. (question # updated to 9 m.)		
PART C – INCOME/RESOURCES/EXPENSES Question 8 n. (question # updated to 9 n.)		Other expenses
YOUR CERTIFICATION section	I certify that I understand the questions on the application and that my household is in need of Disaster CalFresh benefits. I have read the above Penalty Warning (or had it read to me). I authorize the release of any information necessary to determine the accuracy of my eligibility. If I am selected, I will fully cooperate with county, state and federal staff in a review to be conducted after the disaster benefit period. I also understand that I may be required to repay any benefits which are overpaid because I, another adult household member, or the authorized representative reports incorrect or incomplete information.	I certify that I understand the questions on the application and that my household needs Disaster CalFresh benefits. I have read the above Penalty Warning (or had it read to me). I authorize the release of any information necessary to determine the accuracy of my eligibility. If I am selected, I will fully cooperate with county, state, and federal staff in a review to be conducted after the disaster benefit period. I also understand that I may be required to repay any benefits which are overpaid because I, another adult household member, or the authorized representative reports incorrect or incomplete information.
COUNTY USE ONLY section, right side of page	Can the identify of the Authorized Representative be verified?	Can the identity of the Authorized Representative be verified?
COUNTY USE ONLY section, right side of page. Line added in new version. Text bolded.	Type of verification:	Type of verification: _____
COUNTY USE ONLY section, right side of page	Household size for the number of persons listed in 5 _____ .	Household size for the number of persons listed in 6 _____ .
COUNTY USE ONLY section, right side of page (word removed).	Computation	
COUNTY USE ONLY section, right side of page	A. Anticipated Income (from 6)	A. Anticipated Income (from 7)
COUNTY USE ONLY section, right side of page	B. Accessible Cash Resources (from 7)	B. Accessible Cash Resources (from 8)

COUNTY USE ONLY section, right side of page B, C, D, E. Remove +, =, - symbols (circled in red for demonstration purposes)	<p>B. Accessible Cash Resources (from 7) \oplus \$ _____</p> <p>C. Total disaster period income (A+B) $=$ \$ _____</p> <p>D. Total allowable disaster-related expenses (from 8) $-$ \$ _____</p> <p>E. Accessible disaster period income (C-D) $=$ \$ _____</p>	<p>B. Accessible Cash Resources (from 8) \$ _____</p> <p>C. Total Disaster Period Income (A+B) \$ _____</p> <p>D. Total Allowable Disaster-Related Expenses (from 9) \$ _____</p> <p>E. Accessible Disaster Period Income (C-D) \$ _____</p>
COUNTY USE ONLY section, right side of page	D. Total Allowable disaster-related expenses	D. Total Allowable Disaster-Related expenses
COUNTY USE ONLY section, right side of page	E. Accessible disaster period income	E. Accessible Disaster Period Income
COUNTY USE ONLY section, right side of page	F. Maximum Disaster Income Limit for household size (from Table)	F. Maximum Disaster Income Limit for Household size (from Table)
COUNTY USE ONLY section, right side of page. Text removed in new version.	Eligible: YES NO Allotment	
COUNTY USE ONLY section, right side of page 2., 3. Remove =, - symbols (circled in red for demonstration purposes)	<p>2. Regular Allotment Already Received $-$ \$ _____</p> <p>3. Net Disaster Allotment (1-2) $=$ \$ _____</p>	<p>2. Regular Allotment Already Received \$ _____</p> <p>3. Net Disaster Allotment (1-2) \$ _____</p>

2.1.3 Form Variable Population

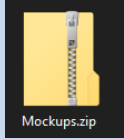
There are no changes to this section.

2.1.4 Form Generation Conditions

There are no changes to this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
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1	Client Correspondence	Mockups.zip	
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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.2.1 CAR-1223	The LRS shall include standard electronic templates for all notices, NOAs, forms, letters, stuffers, and flyers that can be easily maintained by non-technical COUNTY-specified Users.	Update CF 385 to the latest state version (01/24).

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253606

Task mgmt.: Update Dashboard for Task Mgmt –
Phase 2

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia and Gokul Suresh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/10/2023	1.0	Initial Version	Esequiel Herrera-Ortiz
06/28/2023	1.1	Added requirement to rename all the Qlik ID columns to Task ID per county request.	Esequiel Herrera-Ortiz
01/23/2024	1.2	Adding a Task Sub-Type Column to the dashboard.	Esequiel Herrera-Ortiz
02/28/2024	1.3	Fixed several references to the Real Time Task Management Productivity sheet which were incorrectly labeled as Real Time Task Management. In Description of Change #2, the case lists were repeated twice. This has been corrected.	Esequiel Herrera-Ortiz
03/04/2024	1.4	Added example screenshots for each requirement.	Esequiel Herrera-Ortiz
03/07/2024	1.5	Updated all references of case list to task list. This is to match the dashboard header. This does not impact development.	Esequiel Herrera-Ortiz

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1 OVERVIEW

With **CA-253667 Task Mgmt: Configurable Task Categories** the CalSAWS system will allow counties to create their own custom Task Categories. With CA-253606, the Real Time Task Management Dashboard will be updated to display the new Task Categories.

1.1 Current Design

The Task Management Dashboard is not set up to display the new county configurable Task Categories that will be introduced to the system with **CA-253667 Task Mgmt: Configurable Task Categories**.

The existing 'Qlik ID' column, found in every **Task List**, displays the 'Task ID' value.

The report does not include Task Sub-Type information.

1.2 Requests

Update the Task Management Dashboard to use the new county configurable Task Categories that will be introduced to the system with **CA-253667 Task Mgmt: Configurable Task Categories**.

Rename all the 'Qlik ID' columns in the dashboard to 'Task ID'.

Add a new Task Sub-Type column next to every Task Type column.

1.3 Overview of Recommendations

1. Update the Task Management Dashboard to use the new county configurable Task Categories.
2. Rename all the 'Qlik ID' columns in the dashboard to 'Task ID'.
3. **Add a new Task Sub-Type column next to every Task Type column.**

1.4 Assumptions

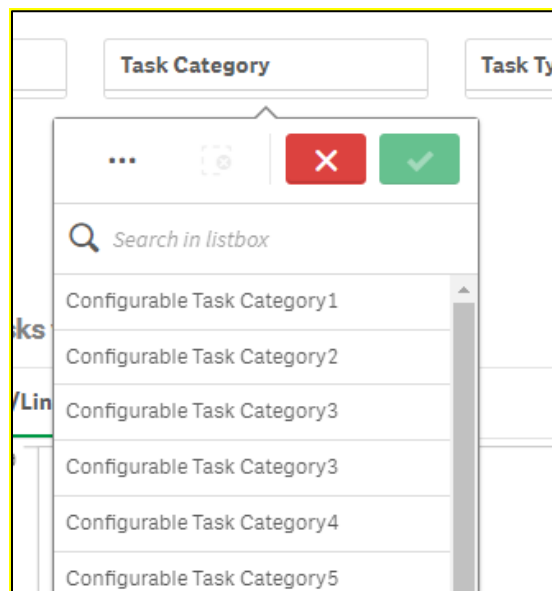
1. The new tables which store the county configurable task categories will include the task categories for historical tasks.

Note: The Screenshot above does not display the county configurable task categories since they functionality has not been introduced to the system.

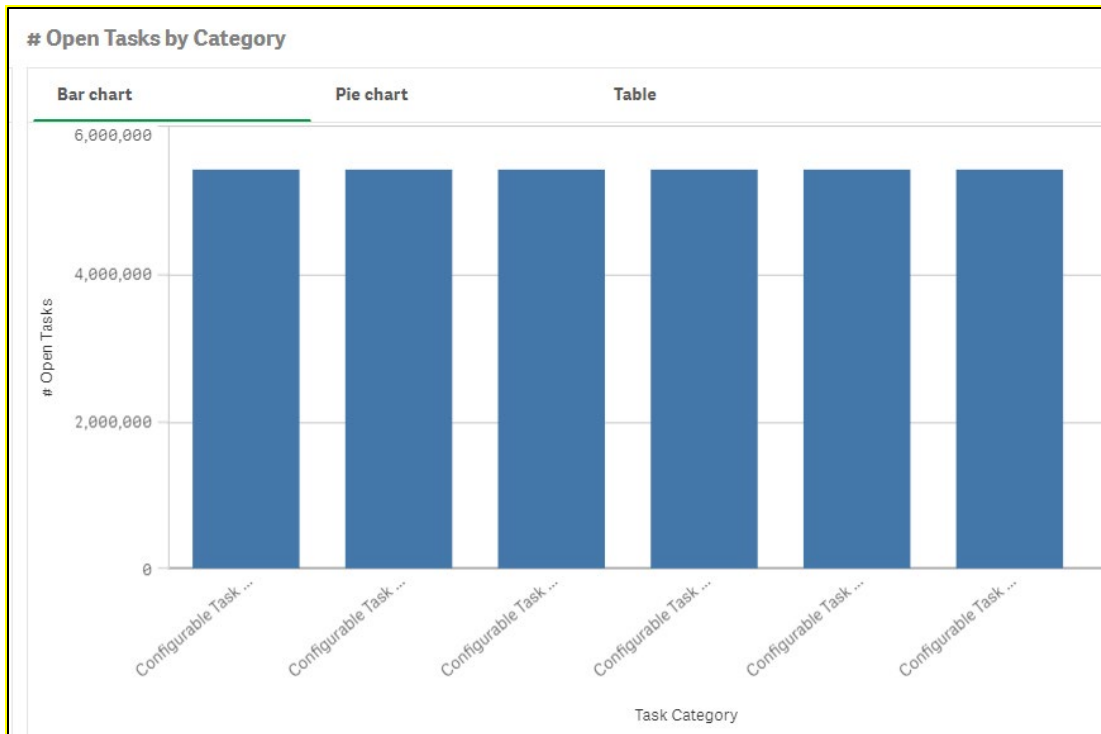
2.1.3 Description of Change

1. Update all Task Category references in the Real Time Task Management Dashboard to use the new county configurable Task Category values that are being introduced as part of **CA-253667 Task Mgmt: Configurable Task Categories**.

Example 1: Parameter



Example 2: Widgets



Note: The horizontal axis which displays Task Category now displays the county defined configurable task categories.

Example 3: Tase Lists

CalSAWS # Open Tasks by Category

Case Number	Division	Office	Unit	Worker	BANK Number	Task Category
1000003	Unknown	Yolo County - Benefits Center	1R - Benefits Center Unit Five (CBC5)	5700000005	-	Configurable Task Category1
1000002	Unknown	Yolo County - Benefits Center	1R - Benefits Center Unit Five (CBC5)	5700000005	-	Configurable Task Category2
1000005	Unknown	Yolo County - Benefits Center	23 - Benefits Center Unit Six (CBC6)	5700000006	-	Configurable Task Category3

Note: Every Task List, which has the Task Category column, now displays the county defined configurable task categories.

Technical Note: The following sections within the dashboard are impacted:

The Task Category Parameter within the following sheets:

- Historical Task Management
- Real Time Task Management
- Historical Task Management Productivity
- Real Time Task Management Productivity

Historical Task Management Widgets:

- Open Tasks by Category
- Open Tasks by Category (Division Drill Down)
- # Completed Tasks by Category
- # Completed Tasks by Category (Division Drill Down)

Historical Task Management Task Lists:

- # Open Tasks vs # Workers – Task List
- # Open Tasks by Category
- Tasks by Status and Status Date
- # Completed Tasks by Category

Real Time Task Management Widgets:

- # Overdue Tasks (Division Drill Down)
- # Open Tasks by Category
- # Completed Tasks During Current Day by Category
- # Open Tasks by Category (Division Drill Down)
- # Completed Tasks During Current Day by Category (Division Drill Down)
- # Assigned Tasks by Division
- # Completed Tasks During Current Day By Division

Real Time Task Management Task Lists:

- # Overdue Tasks
- # Open Tasks by Category
- # Completed Tasks During Current Day by Category
- # Completed Tasks During Current Day by Division
- # Open Tasks by Category
- Tasks Assigned to Banks

Historical Task Management Productivity Widgets:

- # Open Tasks by Category
- # Open Tasks by Category (Division Drill Down)
- # Completed Tasks by Category
- # Overdue Tasks
- # Completed Tasks by Category (Division Drill Down)
- # Overdue Tasks (Division Drill Down)

Historical Task Management Productivity Task Lists:

- # Open Tasks by Category
- # Completed Tasks by Category
- # Overdue Tasks
- Tasks Completed Timely

- # Task Processing Time

Real Time Task Management Productivity Widgets:





- # Open Tasks by Category
- # Open Tasks by Category (Division Drill Down)
- # Completed Tasks During Current Day by Category
- # Overdue Tasks
- # Completed Tasks During Current Day by Category (Division Drill Down)
- # Overdue Tasks (Division Drill Down)

Real Time Task Management Productivity Task Lists:

- # Open Tasks by Category
- # Overdue Tasks
- # Open Tasks by Category

2. Rename all the 'Qlik ID' columns in the dashboard to 'Task ID'.
Note this does not affect the value that is displayed.

Example:

Task Due Date 	# Remaining Days 	Overdue Indicator 	Task ID 
04/04/2024	31	N	1071806123
04/03/2024	30	N	1065768754
04/04/2024	31	N	1064789923

Note: Currently every task list has an existing Qlik ID located to the far right. It will now be renamed to Task ID.

Technical Note: This column is pulled from TASK.ID.

Historical Task Management Task Lists:

- # Open Tasks vs # Workers – Task List
- # Open Tasks by Category
- Tasks by Status and Status Date Month/Week/Day
- # Completed Tasks by Category

Real Time Task Management Task Lists:

- # Overdue Tasks
- # Open Tasks by Category
- # Completed Tasks During Current Day by Category
- # Completed Tasks During Current Day by Division
- # Open Tasks Coming Due

- Tasks Assigned to Banks

Historical Task Management Productivity **Task** Lists:

- # Open Tasks by Category
- # Completed Tasks by Category
- # Overdue Tasks
- Tasks Completed Timely
- # Task Processing Time

Real Time Task Management **Productivity Task** Lists:

- # Open Tasks by Category
- # Overdue Tasks
- # Open Tasks by Category

3. Update all task lists which include the Task Type Column to include a new Task Sub-Type column. The column is placed immediately to the right of the existing Task Type column.

Column Name	Column Description
Task Sub-Type	Displays the Tasks Sub Type of the task. Technical Note: TASK_SUB_TYPE.SUB_TYPE_NAME

Example:

Task Type	Task Sub-Type	Task Assign Date	Task Due Date
MEDS Alerts	Task Sub-Type1	12/30/2022	12/27/2022
MEDS Alerts	Task Sub-Type2	12/30/2022	12/27/2022
MEDS Alerts	Task Sub-Type3	12/30/2022	12/27/2022

Note: The Task Sub-Type column is placed immediately to the right of the existing Task Type column. Task Sub-Type information can only be found within task lists.

Technical Note: The task lists listed below are impacted.

Historical Task Management Task Lists:

- # Open Tasks vs # Workers – Task List
- # Open Tasks by Category
- Tasks by Status and Status Date
- # Completed Tasks by Category

Real Time Task Management Task Lists:

- # Overdue Tasks
- # Open Tasks by Category
- # Completed Tasks During Current Day by Category
- # Completed Tasks During Current Day by Division
- # Open Tasks by Category
- Tasks Assigned to Banks

Historical Task Management Productivity Task Lists:

- # Open Tasks by Category
- # Completed Tasks by Category
- # Overdue Tasks
- Tasks Completed Timely
- # Task Processing Time

Real Time Task Management Productivity Task Lists:

- # Open Tasks by Category
- # Overdue Tasks
- # Open Tasks by Category

2.1.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: Real Time Task Management**

2.1.5 Counties Impacted

All CalSAWS counties are impacted by the change outlined in this section.

2.1.6 Security Updates

No updates are made to the dashboard's existing security.

2.1.7 Report Usage/Performance

There will be no notable impact to the report's performance.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A			

4 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-253759

ACL 23-30 - Paid Family Leave (PFL) CalWORKs
Time Limit Exemption

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/10/24	1.0	Initial Version	Thomas Lazio, Andrea Rodriguez, Jimmy Tu, Justin Bourbonniere, Shining Liu, Vallari Bathala
2/14/24	1.1	Updates made to design per committee feedback	Andrea Rodriguez, Jimmy Tu
2/22/24	1.2	Design Clarification to correct Section 2.2.3.3. and Section 2.4	Andrea Rodriguez
3/12/24	2.1	Content Revision 1 Remove Recommendation 2.2.3.2.a. and replace mock-up to reflect changes.	Andrea Rodriguez

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1 OVERVIEW

1.1 Current Design

Currently, CalSAWS does not have an income type or time limit exemption for Paid Family Leave (PFL).

1.2 Requests

This SCR will address Assembly Bill AB2300. The SCR will introduce a new Paid Family Leave (PFL) income type and exemption type. Those receiving paid family leave benefits, will be eligible to the PFL time limit exemption that will exempt their CW

time clock for the benefit months of the PFL. This is SCR will also include the addition of new WTW/REP Good Cause status reasons per ACL 23-30.

1.3 Overview of Recommendations

1. Eligibility – Add new 'Paid Family Leave (PFL)' income type and configure treatment of the income types across different programs.
2. Fiscal – Update Code Detail Category 863 to include a new Time Limit Exemption for 'Paid Family Leave' (Exempt CW Time Clock)
3. Fiscal – Add the Reason of 'Paid Family Leave' to the 'Exempt' Category on the Cash Aid Time Limit Month Detail page.
4. Fiscal – Update the Cash Aid Time Limit Month Detail page to throw a hard validation if a time limit exemption is added for PFL and the begin date is not within the begin and end month set on the Cash Aid Time Limit Month Detail page.
5. Fiscal – Update the Time Limit Monthly Batch to set the exemption of '380 - Paid Family Leave Exemption' when there is an income record with the category of 'Disability' and type of 'Paid Family Leave' on the Income Detail page for the benefit month.
6. Online – Verify new 'Paid Family Leave (PFL)' income type options on the Income Detail page.
7. Online – Add new 'Paid Family Leave (PFL)' income type options to County Parameter Detail page and set default values for GA/GR Automated Solution.
8. Online – Update the 'Other' OCAT Benefit Type under "Other Program Benefits" section to also map the 'Paid Family Leave (PFL)' income type in the systems.
9. Online – Add new Good Cause Status Reasons on the WTW/REP Status Detail Page.
10. Correspondence – Add threshold language translations for new 'Paid Family Leave' income type.
11. Correspondence – Regression testing of Forms and NOAs impacted by the new income type.
12. Task Management – Add Paid Family Leave Income Exemption Automated Action.
13. Task Management – Add Paid Family Leave Income Exemption Automated Action Batch Job.

1.4 Assumptions

1. The Adoptions Assistance Program (AAP) does not consider income and no treatment value is needed for the income types added with this SCR.
2. OCAT will be tested with this SCR.
3. The user will be responsible for adding and maintaining the 'Paid Family Leave (PFL)' income record.
4. The new WTW/REP Good Cause status reasons will not impact or apply to CW time limits (including stopping the CW clock).

5. CW 2184 and CW 2186A form updates will be addressed in future SCR CA-271130. CW 2186B form updates will be addressed in future SCR CA-235922.
6. No changes will be made to the CalFresh Work Registration (CFWR) functionality. Workers will continue to enter a CalFresh Eligibility Non-Compliance record if the customer does not have 'Good Cause'.
7. There is no impact to IEVS or MEDS.
8. The time limit monthly batch will apply the new '380 - Time Limit Exemption' for benefit months that have a PFL income record. This batch applies time limit exemptions only for the future month. (Example: When the batch runs in 02/2024, it will apply the time limit exemption for the month of 03/2024). If an income record for PFL is updated / removed, the user will be required to manually add/remove the time limit exemption.
9. If a household has multiple parties and each party has their own time limit record, each individual with a verified Paid Family Leave Income record will have a PFL time limit exemption added.
10. Existing logic for setting '403' exception for Good Cause reason "Domestic violence" will not be changed with this SCR.

2 RECOMMENDATIONS

2.1 Income Detail

2.1.1 Overview

This SCR will update the Income Detail page to include a 'Paid Family Leave (PFL)' type option for 'Disability' income categories.

2.1.2 Income Detail Mockup

Income Detail

* - Indicates required fields

Save and Add Another Save and Return Cancel

Name: *
DOE, JANE 38F

Retrieve Information

Category:
Disability

Source:

Frequency: *
- Select -

Type: *
- Select -
- Select -
Employee - Temporary
Employee - Permanent
Paid Family Leave (PFL)
Private - Permanent
Private - Temporary
SDI
Worker's Comp - Permanent
Worker's Comp - Temporary

Description:

Shared with RDP

Pickle Eligibility

Income Amounts *

Display Program: *
- Select -

Figure 2.1.1 – Income Detail Type drop-down values (Edit)

2.1.3 Description of Changes

1. Verify the income type option 'Paid Family Leave (PFL)' appears on the 'Type' field of the 'Disability' income category in alphabetical order on the Income Detail page (as shown in Figure 2.1.1).
Note: The fields displayed on the Income Detail and Income Amount Detail page will be the same as for other Type options selected when the income Category is 'Disability'.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial > Income

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page has been assessed for accessibility requirements and meets the Accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 County Parameter Detail

2.2.1 Overview

This SCR will update the County Parameter Detail page to add 'Paid Family Leave (PFL)' as an item so that users with access rights can view and edit the 'Value', 'Begin Month' and 'End Month' fields.

2.2.2 County Parameter Detail Mockup

County Parameter Detail

Edit

Close

Disability

County:
Alameda

View Month:
01/2024 

View

Item	Value	Begin Month	End Month
Employee - Temporary	Exempt	12/2020	
Employee - Permanent	Exempt	12/2020	
Paid Family Leave (PFL)	Unearned	12/2020	
Private - Permanent	Unearned	12/2020	
Private - Temporary	Unearned	12/2020	
SDI	Earned	12/2020	
Worker's Comp - Permanent	Earned	12/2020	
Worker's Comp - Temporary	Unearned	12/2020	

Figure 2.2.1 – County Parameter Detail (View)

County Parameter Detail

Save Cancel

Disability

County:
Alameda

View Month:
01/2024

Item	Value	Begin Month	End Month
Employee - Temporary	Exempt	12/2020	
Employee - Permanent	Exempt	12/2020	
Paid Family Leave (PFL)	Unearned	12/2020	
Private - Permanent	Earned	12/2020	
Private - Temporary	Unearned	12/2020	
SDI	Earned	12/2020	
Worker's Comp - Permanent	Earned	12/2020	
Worker's Comp - Temporary	Unearned	12/2020	

Figure 2.2.2 – County Parameter Detail (Edit)

2.2.3 Description of Changes

1. Add 'Paid Family Leave (PFL)' as an Item on the County Parameter Detail page for the 'Income' County Parameter Category and 'Disability' County Parameter Type (as shown on Figures 2.2.1 and 2.2.2).
2. The Value drop-down field for the 'Paid Family Leave (PFL)' will have the following options in order:
 - a. Blank
 - b. 'Earned'
 - c. 'Exempt'
 - d. 'Unearned'
3. The default Value for the 'Paid Family Leave (PFL)' item will be the following for each GA/GR Automated Solution County:

County	Value
Alameda	Unearned
Contra Costa	Unearned
Fresno	Unearned
Los Angeles	Unearned
Orange	Unearned
Placer	Unearned
Sacramento	Unearned
Santa Barbara	Unearned
Santa Clara	Unearned

Santa Cruz	Unearned
San Diego	Unearned
San Francisco	Unearned
San Luis Obispo	Unearned
San Mateo	Unearned
Solano	Unearned
Sonoma	Unearned
Tulare	Unearned
Ventura	Unearned
Yolo	Unearned

2.2.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** GA/GR County Admin > Grants/Income

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

This page has been assessed for accessibility requirements and meets the Accessibility standards.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 OCAT Referral Detail

2.3.1 Overview

Update the 'Other' OCAT Benefit Type under "Other Program Benefits" section to also map the 'Paid Family Leave (PFL)' income type in the systems.

2.3.2 OCAT Referral Detail Mockup

▼ Other Program Benefits		
OCAT Benefit Type	Amount or Value of Service	
CalFresh	246.00	
CalWORKs	280.00	
CAPI	0.00	
Child Care	0.00	
Housing	0.00	
State Disability Insurance (SDI)	0.00	
Student Scholarships and Grants	0.00	
Supplemental Social Security	0.00	
Transportation	0.00	
Unemployment	0.00	
Veterans	0.00	
Other	100.00	
Receiving Medi-Cal or Covered CA: Yes Receive CalWORKs In this County or Other County Before: Yes	Type	Amount
	R Guaranteed Income - Cash Exempt	0.00
	N Guaranteed Income - Cash/CalFresh Exempt	0.00
	II Guaranteed Income - Cash/MC Exempt	0.00
	L Guaranteed Income - Exempt	0.00
	Guaranteed Income - MC Exempt	0.00
	Guaranteed Income - Unearned	0.00
	Paid Family Leave (PFL)	100.00
▼ Expenses		

Figure 2.3.1 – OCAT Referral Detail

2.3.3 Description of Changes

- The 'Other' OCAT Benefit Type under "Other Program Benefits" section will be updated to also map the 'Paid Family Leave (PFL)' income type in the systems.
 - The total income amount value as of the OCAT referral date will be used in determining the Amount or Value of Services.
 - The Paid Family Leave (PFL) Type Amount will appear in the tool tip for the listed Amount or Value of Service, as shown in Figure 2.3.1.

2.3.4 Page Location

- **Global:** Employee Services
- **Local:** Appraisal, Case Summary
- **Task:** OCAT

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

This page has been assessed for accessibility requirements and meets the Accessibility standards.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 WTW/REP Status Detail

2.4.1 Overview

The WTW and REP 'Good Cause' status reasons were expanded with ACL 23-30 and referenced in ACL 23-95. This SCR will update the Status Reason drop-down with new 'Good Cause' status reason options and alphabetize the order in which the options appear.

2.4.2 WTW/REP Status Detail Mockup

WTW Status Detail

*- Indicates required fields

Save and Return Cancel

Status: *
Good Cause ▼

Begin Date: *
01/01/2024 📅

Status Reason: *
- Select -
- Select -
Difficult pregnancy
Domestic violence
Family Stabilization
Homeless Participant
Lack of supportive services
Legal Difficulties
Mental health
Mental health/Physical Disabilities
No Child Care Available
No Child Care during Non-Traditional Hours
No Child Care Transportation Available
No Stage 1 Available for Other Reasons
No Stage 1 Funding Available
No Stage 1 Provider for Children
No transportation
Other Substantial & Compelling Reasons
Recipient's rights were violated
Second Parent
Substance abuse

End Date:
📅

Save and Return Cancel

This Type 1 page took 0.76 s

Figure 2.4.2.1 – WTW Status Detail Status Reason Drop-down (Part 1)

WTW Status Detail

*- Indicates required fields

Save and Return

Cancel

Status: *
Good Cause ▼

Begin Date: *
01/01/2024

Status Reason: *

- Select -
- Homeless Participant
- Lack of supportive services
- Legal Difficulties
- Mental health
- Mental health/Physical Disabilities
- No Child Care Available
- No Child Care during Non-Traditional Hours
- No Child Care Transportation Available
- No Stage 1 Available for Other Reasons
- No Stage 1 Funding Available
- No Stage 1 Provider for Children
- No transportation
- Other Substantial & Compelling Reasons
- Recipient's rights were violated
- Second Parent
- Substance abuse
- Travel Time Exceeds two hours round trip or two miles walking
- Unhealthy workplace
- Unpredictable work hours
- Verified illness < 30 days

End Date:

Save and Return

Cancel

This Type 1 page took 0.76 s

Figure 2.4.2.2 – WTW Status Detail Status Reason Drop-down (Part 2)

REP Status Detail

*- Indicates required fields

Save and Return

Cancel

Status: *
Good Cause ▼

Begin Date: *
01/01/2024

Designated Program:
▼

Status Reason: *

- Select -
- Select -
- Difficult pregnancy
- Domestic violence
- Family Stabilization
- Homeless Participant
- Lack of supportive services
- Legal Difficulties
- Mental health
- Mental health/Physical Disabilities
- No Child Care Available
- No Child Care during Non-Traditional Hours
- No Child Care Transportation Available
- No Stage 1 Available for Other Reasons
- No Stage 1 Funding Available
- No Stage 1 Provider for Children
- No transportation
- Other Substantial & Compelling Reasons
- Recipient's rights were violated
- Second Parent
- Substance abuse

End Date:
02/03/2024

Save and Return

Cancel

This Type 1 page took 0.39 s

Figure 2.4.2.3 – REP Status Detail Status Reason Drop-down (Part 1)

REP Status Detail

*- Indicates required fields

Save and Return

Cancel

Status: *
Good Cause ▼

Status Reason: *
- Select -
Homeless Participant
Lack of supportive services
Legal Difficulties
Mental health
Mental health/Physical Disabilities
No Child Care Available
No Child Care during Non-Traditional Hours
No Child Care Transportation Available
No Stage 1 Available for Other Reasons
No Stage 1 Funding Available
No Stage 1 Provider for Children
No transportation
Other Substantial & Compelling Reasons
Recipient's rights were violated
Second Parent
Substance abuse
Travel Time Exceeds two hours round trip or two miles walking
Unhealthy workplace
Unpredictable work hours
Verified illness < 30 days

Begin Date: *
01/01/2024

End Date:
02/03/2024

Designated Program
▼

Save and Return Cancel

This Type 1 page took 0.39 s

Figure 2.4.2.4 – REP Status Detail Status Reason Drop-down (Part 2)

2.4.3 Description of Changes

1. Add the following 'Good Cause' Status Reasons for 'WTW' and 'REP' programs:
 - a. Unhealthy workplace
 - b. Unpredictable work hours
 - c. Recipient's rights were violated

Technical Note: All reference table field values in the code table CT73 will be set to null for the above new 'Good Cause' reasons.

2. Update the 'Good Cause' Status Reasons drop-down to display options in alphabetical order.

2.4.4 Page Location

- **Global:** Employment Services
- **Local:** Case Summary
- **Task:** WTW or REP

2.4.5 Page Mapping

N/A

2.5 Eligibility - New Paid Family Leave (PFL) Income Type

2.5.1 Overview

Per ACL 23-30, the disability-based unearned income will be expanded to include Paid Family Leave (PFL) benefits and, effective 10/01/2024, disability-based unearned income disregards will apply to these PFL benefits.

A new 'Paid Family Leave (PFL)' income type will be added, and the treatment of this income type will be configured across different programs. For GA/GR Automated Solution, see Section 2.2.3.3 for program treatment.

2.5.2 Description of Changes

1. Add new income type of 'Paid Family Leave (PFL)' under 'Disability' income category. Two separate records will be added to the income type table (CT186) for this income type based on 1a and 1b shown below.
 - a. Effective as of the minimum date to 09/30/2024, configure treatment of income across the different programs without disability disregard for CW based on the following:

Program	Treatment
CW	Unearned Income
CF	Unearned Income
RCA	Unearned Income
Foster Care	Earned Income
Kin-GAP	Unearned Income
CAP	Unearned Income
Medi-Cal	Earned Income
GA (LA Only)	Unearned Income
Immediate Need	Unearned Income
Diversion	Unearned Income
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	MS
CalHEERS Outbound	MS
Disregards	
CWDisabilityDisregard	No

MCDisabilityDisregard	No
-----------------------	----

- b. Effective as of 10/01/2024 to high date, configure treatment of income across the different programs with disability disregard for CW based on the following:

Program	Treatment
CW	Unearned Income
CF	Unearned Income
RCA	Unearned Income
Foster Care	Earned Income
Kin-GAP	Unearned Income
CAPI	Unearned Income
Medi-Cal	Earned Income
GA (LA Only)	Unearned Income
Immediate Need	Unearned Income
Diversion	Unearned Income
CalHEERS Inbound/Outbound Codes	
CalHEERS Inbound	MS
CalHEERS Outbound	MS
Disregards	
CWDisabilityDisregard	Yes
MCDisabilityDisregard	No

2.5.3 Programs Impacted

CW, CF, RCA, FC, KG, CAPI, MC, GA (LA Only), IN, DV

2.6 Fiscal – Code Table Change Request

2.6.1 Overview

Update Code Detail Table Category 863 to include a new time limit exemption for Paid Family Leave according to ACL 23-30, ACL 24-07, AB 2300.

2.6.2 Description of Change

1. Update Code Detail Category 863 to include a new Time Limit Exemption for '380 - Paid Family Leave Exemption' (Exempt CW Time Clock)
 - a. Begin Date: 10/01/2024
 - b. End Date: High Date
 - c. Short Decode Name: Paid Family Leave Exemption
 - d. Long Decode Name: 380 – Paid Family Leave Exemption
 - e. Refer table 1 descr (TANF): N
 - f. Refer table 2 descr (CalWORKS): Y
 - g. Refer Table 5 descr (Exempt); Y
 - h. Refer Table 7 descr (WDTIP Program Exception Code): 03
 - i. Refer Table 8 descr (WDTIP Program Exception Reason Code): 380

2.6.3 Estimated Number of Records Impacted/Performance

1 record.

2.7 Time Limit Monthly Batch Job

2.7.1 Overview

The Time Limit Monthly batch job will set 380 – Paid Family Leave Exemptions when there is an income record on the Income Detail page. This batch runs ~2 days before the end of each month and will apply time limit exemptions for the future month. (Example: When the batch runs in 10/2024, it will apply the time limit exemption for the month of 11/2024). If an income record for PFL is updated / removed, the user will be required to manually add/remove the time limit exemption.

2.7.2 Description of Change

1. Update the Time Limit Monthly Batch (PBXXE305) to set the exemption of '380 - Paid Family Leave Exemption' when there is a verified income record with the category of 'Disability' and type of 'Paid Family Leave' on the Income Detail page for the benefit month.
 - a. Note: Paid Family Leave Time Limit Exemptions will be applied to the Cash Aid Time Limit Month detail page based on the begin and end date of the Income Record. When there is no end date, the batch will continue to apply the exemption for future months.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

No Change.

2.7.5 Counties Impacted

No Change.

2.7.6 Data Volume/Performance

No Change.

2.7.7 Failure Procedure/Operational Instructions

No Change.

2.8 Fiscal: Cash Aid Time Limit Month Detail page

2.8.1 Overview

This SCR will update the Cash Aid Time Limit Month Detail page to allow users to add / remove time limit exempt type of 'Paid Family Leave'.

2.8.2 Cash Aid Time Limit Month Detail Mockup

Cash Aid Time Limit Month Detail

* - Indicates required fields

Save Cancel

Name: *	Effective Month: *	Add Reason: *
[Redacted]	03/2024	Manual
Aid Issued By: *	Send to WDTIP? *	Case Number: *
Los Angeles	Yes	[Redacted]
Program: *	Aid Code: *	
CalWORKs	30 - CW-All Other Families (Fed)	

Exceptions

Type	Reason	Clocks	Created By
Exempt	380 - Paid Family Leave Exemption		

Add

Last Updated On 02/05/2024 3:11:14 PM By: 1031264

Save Cancel

Figure 2.8.2 – Cash Aid Time Limit Month Detail Page Mockup

2.8.3 Description of Changes

1. Add the Reason of '380 - Paid Family Leave Exemption' to the 'Exempt' Category. Please see mockup (Section 2.7.2).

2. Update the Cash Aid Time Limit Month Detail page to throw a validation if a time limit exemption is added for Paid Family Leave Exemption prior to the begin date of the exemption reason (10/1/2024).
 - a. Reason – The Exemption Reason '380 – Paid Family Leave Exemption' is only applicable for time limit months from 10/2024 onwards.

2.8.4 Page Location

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

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A.

2.9 Batch & Interfaces - Regression test Outbound WDTIP

2.9.1 Overview

Outbound WDTIP LD02 transactions are generated when the aid code, adult/child indicator, federal/state indicator, or person status code change for a customer participating in a cash assistance program. For every time limit month, two transactions are sent – an LD02 AID transaction with effective date the beginning of the month, and an LD02 DISC with effective date the end of the month.

Outbound WDTIP LD09 transactions are generated whenever an individual is granted an exemption. Since any month in which a CalWORKs (CW) recipient receives Paid Family Leave (PFL) benefits is exempt from counting toward the CW time limit, regression test WDTIP LD09 transactions to ensure that exemptions are applied to the CW time limit and not applied to the TANF time limit.

2.9.2 Description of Change

1. Regression test outbound WDTIP LD02 and LD09 transactions (POXXE821, POXXE827). Ensure that the PFL is exempt from counting toward the CW time limit, but not the TANF time limit.
 - a. The WDTIP Program Exception code is 03 and the WDTIP Program Exception Reason code is 380 for PFL.
 - i. Note: 03/380 is not effective until 10/01/2024.

2.9.3 Partner Integration Testing

Yes. After programming changes are made, CalSAWS will generate 1 outbound file to WDTIP containing LD02 and LD09 transactions.

2.9.4 Execution Frequency

No change. Daily (M-F).

2.9.5 Key Scheduling Dependencies

No change.

POXXE821 (WDTIP LD02 Transaction Writer) runs after PB00S214 (2nd Run Time Limit Program Participation Super Trigger Sweep), PB00S384 (2nd Run Time Limit Detail Super Trigger Sweep), PB00T621 (Batch ABAWD Determination), and POXXE820 (WDTIP LD01 Transaction Writer), and before POXXE824 (WDTIP LD03 Transaction Writer) and POXXE829 (WDTIP Merge File).

POXXE827 (WDTIP LD09 Transaction Writer) runs after PB00S214 (2nd Run Time Limit Program Participation Super Trigger Sweep), PB00S384 (2nd Run Time Limit Detail Super Trigger Sweep), PB00T621 (Batch ABAWD Determination), and POXXE826 (WDTIP LD08 Transaction Writer), and before POXXE829 (WDTIP Merge File).

2.9.6 Counties Impacted

All counties.

2.9.7 Category

No change.

2.9.8 Data Volume/Performance

N/A

2.9.9 Interface Partner

Welfare Data Tracking Implementation Project (WDTIP).

2.9.10 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 Correspondence – Code Table Change Request - Add threshold language translations for new 'Paid Family Leave' income types.

2.10.1 Overview

Update Code Detail Table Category 186 to include translations for the new income type Paid Family Leave (PFL). There are two records being added in Section 2.4, both records should be updated with translations.

2.10.2 Description of Change

1. Data Change Request (DCR) to CATGRY table FIELD_LABEL_DESCR column to add the six new threshold languages (Hindi, Japanese, Mien, Punjabi, Thai, and Ukrainian) for the new income types added in this SCR.
2. Data Change Request (DCR) to CODE_DETL CT186 table to add translations for the new income types added in this SCR.

CT186 Column	Language
REFER_TABLE_19_DESCR	Spanish
REFER_TABLE_20_DESCR	Armenian
REFER_TABLE_21_DESCR	Arabic
REFER_TABLE_22_DESCR	Cambodian
REFER_TABLE_23_DESCR	Chinese
REFER_TABLE_24_DESCR	Farsi
REFER_TABLE_25_DESCR	Tagalog
REFER_TABLE_26_DESCR	Hmong
REFER_TABLE_27_DESCR	Korean
REFER_TABLE_28_DESCR	Lao

REFER_TABLE_29_DESCR	Russian
REFER_TABLE_30_DESCR	Vietnamese
REFER_TABLE_33_DESCR	Hindi
REFER_TABLE_34_DESCR	Japanese
REFER_TABLE_35_DESCR	Mien
REFER_TABLE_36_DESCR	Punjabi
REFER_TABLE_37_DESCR	Thai
REFER_TABLE_38_DESCR	Ukrainian

2.10.3 Estimated Number of Records Impacted/Performance

3 records.

2.11 Correspondence – Regression testing of Forms and NOAs impacted by the new income type

2.11.1 Overview

Regression Test Forms and NOAs impacted by the new income type.

2.11.2 Description of Change

Impacted Forms: CSD 1, CW 2200, SAR 7, MC 210 RV, MC 216, MC 217

Impacted NOAs: CF_TN_UNVERF_BUDMTH_ERN_INC_F035,
 CF_DN_UNVERF_BUDMTH_ERN_INC_F035,
 CF_TN_UNVERF_BUDMTH_UNERN_INC_F037,
 CF_DN_UNVERF_BUDMTH_UNERN_INC_F037,
 MC_TN_FAIL_REDETER_VERIF_M401, MC_DN_FAIL_DETER_VERIF_M410,
 MC_DN_RETRO_FAIL_DETER_VERIF_M411, Q_DN_FAIL_DETER_VERIF_Q410,
 Q_TN_FAIL_VERIF_DETERM_Q410, Q_DN_RETRO_FAIL_DETER_VERIF_Q411

2.12 CW Time Clock: Paid Family Leave Income Exemption Automated Action

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

EditClose

Action Information

Name:
CW Time Clock: Paid Family Leave Income Exemption

Type:
Create Task

Status: *
Inactive

Program(s):
CW

Run Date:
1st day of each month(Mon-Sat)

Source:
Batch

Scenario:
A Paid Family Leave Income exemption has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered on the Paid Family Leave Income record.

Task Information

Task Type: *

Due Date:
Default Due Date

Initial Assignment:
Default Assignment

Sibling Assignment:
No

Long Description:
A Paid Family Leave Income record has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered. Review and update the Paid Family Leave Income record End Date accordingly.

Default Due Date:
5 business days

Default Assignment:
Current Program Worker

EditClose

Figure 2.12.2-1 – Automated Action Detail View Mode

Automated Action Detail

Save And Return
Cancel

Action Information

Name: CW Time Clock: Paid Family Leave Income Exemption	Type: Create Task	Status: * Inactive
Program(s): CW	Run Date: 1st day of each month(Mon-Sat)	Source: Batch

Scenario:
A Paid Family Leave Income exemption has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered on the Paid Family Leave Income record.

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 Paid Family Leave Income record has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered. Review and update the Paid Family Leave Income record End Date accordingly.

Save And Return
Cancel

Figure 2.12.2-2 – Automated Action Detail Edit Mode

2.12.3 Description of Changes

Implement a CW Time Clock: Paid Family Leave Income Exemption 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. CW Time Clock: Paid Family Leave Income Exemption
 - a. Action Information
 - i. Name: CW Time Clock: Paid Family Leave Income Exemption
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): CW
 - v. Run Date: 1st day of each month(Mon-Sat)

- vi. Source: Batch
- vii. Scenario: A Paid Family Leave Income exemption has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered on the Paid Family Leave Income record.

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 Paid Family Leave Income record has a Begin Date that is 7 or more weeks in the past and an End Date has not been entered. Review and update the Paid Family Leave Income record End Date accordingly.

2.12.4 Page Validations

N/A

2.12.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
 - Click on the hyperlink of the "CW Time Clock: 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.

2.12.6 Security Updates

N/A

2.12.7 Page Mapping

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.

2.12.9 Page Usage/Data Volume Impacts

N/A

2.13 CW Time Clock: Paid Family Leave Income Exemption Automated Action Batch Job

2.13.1 Overview

This section describes the behavior of a new batch process that will invoke the "CW Time Clock: Paid Family Leave Income Exemption" Automated Action.

2.13.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the "CW Time Clock: Paid Family Leave Income Exemption" Automated Action.

The Batch will-evaluate the Begin Dates of the Income Detail records with Type 'Paid Family Leave (PFL)' which are 7 or more weeks 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.

2.13.3 Execution Frequency

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

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 Paid Family Leave Income: Time Clock Exemption Review Automated Action

2.14.1 Overview

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

2.14.2 Automated Action Detail Mockup

Automated Action Detail

Edit
Close

Action Information

Name: Paid Family Leave Income: Time Clock Exemption Review	Type: Create Task	Status: * Inactive
Program(s): CW	Run Date: Monthly or Real Time	Source: Batch/Online

Scenario:
A Paid Family Leave Income record has been added, modified or removed on the Income Detail page (Real Time) or a PFL Income record is effective for a month that does not have a Time Limit exemption entered (Batch Monthly).

Task Information

Task Type: *

Due Date: Default Due Date	Default Due Date: 5 days
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker

Sibling Assignment:
No

Long Description:
A Paid Family Leave Income record has been added, removed, modified OR the income is effective for a month that does not have a Time Limit exemption. Review the Paid Family Leave Income and Time Limit Exemption information.

Edit
Close

Figure 2.14.2-1 – Automated Action Detail View Mode

Automated Action Detail

Save And Return
Cancel

Action Information

Name:	Type:	Status: *
Paid Family Leave Income: Time Clock Exemption Review	Create Task	Inactive ▼
Program(s):	Run Date:	Source:
CW	Monthly or Real Time	Batch/Online
Scenario:		
A Paid Family Leave Income record has been added, modified or removed on the Income Detail page (Real Time) or a PFL Income record is effective for a month that does not have a Time Limit exemption entered (Batch Monthly).		

Task Information

Task Type: *	
- Select - ▼	
Due Date:	Default Due Date:
Default Due Date ▼	5 days
Initial Assignment:	Default Assignment:
Default Assignment ▼	Current Program Worker
Sibling Assignment:	
No ▼	
Long Description:	
A Paid Family Leave Income record has been added, removed, modified OR the income is effective for a month that does not have a Time Limit exemption. Review the Paid Family Leave Income and Time Limit Exemption information.	

Save And Return
Cancel

Figure 2.14.2-2 – Automated Action Detail Edit Mode

2.14.3 Description of Changes

Implement a Paid Family Leave Income: Time Clock Exemption Review Automated Action.

This Automated Action will be invoked in two scenarios:

- a. In real time when a Paid Family Leave Income record is added, modified, or removed on the Income Detail page.
- b. By a batch process on the first business day of each month (Reference [Section 2.15](#) for the specifics of the batch process)

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. Paid Family Leave Income: Time Clock Exemption Review
 - a. Action Information

- i. Name: Paid Family Leave Income: Time Clock Exemption Review
- ii. Type: Create Task
- iii. Status: Inactive
- iv. Program(s): CW
- v. Run Date: Monthly or Real Time
- vi. Source: Batch/Online
- vii. Scenario: A Paid Family Leave Income record has been added, modified or removed on the Income Detail page (Real Time) or a PFL Income record is effective for a month that does not have a Time Limit exemption entered (Batch Monthly).

b. Task Information

- i. Task Type: BLANK
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 5 days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description: A Paid Family Leave Income record has been added, removed, modified OR the income is effective for a month that does not have a Time Limit exemption. Review the Paid Family Leave Income and Time Limit Exemption information.

2.14.4 Page Validations

N/A

2.14.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
 - **Local:** Admin
 - **Task:** Automated Actions > Task Admin
- Click on the hyperlink of the "Paid Family Leave Income: Time Clock Exemption Review" 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.

2.14.6 Security Updates

N/A

2.14.7 Page Mapping

N/A

2.14.8 Accessibility

The following accessibility enhancements have been identified:

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

2.14.9 Page Usage/Data Volume Impacts

N/A

2.15 Paid Family Leave Income: Time Clock Exemption Review Automated Action Batch Job

2.15.1 Overview

This section describes the behavior of a new batch process that will invoke the "Paid Family Leave Income: Time Clock Exemption Review" Automated Action.

2.15.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the "Paid Family Leave Income: Time Clock Exemption Review" Automated Action.

The Batch will-evaluate for Income Detail records with Type 'Paid Family Leave (PFL)' where there exists at least one effective month that does not have a Paid Family Leave Time Limit exemption entered for the same month. An effective month is a month between the begin date of the PFL Income record and the current 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.

2.15.3 Execution Frequency

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

2.15.4 Key Scheduling Dependencies

None.

2.15.5 Counties Impacted

All CalSAWS Counties.

2.15.6 Category

Non-Core.

2.15.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.15.8 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.4.4	The LRS shall include the ability to process a mass update that involves the development of new policy in response to changes in federal, State, and local laws,	This SCR is updating CalSAWS in accordance with policy AB2300 and ACL 23-30.

	rules, regulations, ordinances, guidelines, directives, policies, and procedures.	
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California Statewide Automated Welfare System

Design Document

CA-263119 Expectant Parent Payment
Automation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu, Vallari Bathala
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/15/2023	1.0	Initial Draft	Eric Wu, Vallari Bathala
11/16/2023	1.1	Update Benefits Amount to be calculated based on number of unborn children of a pregnancy	Eric Wu
3/1/2024	1.12	Content Revision: Update Batch Logic for checking manually Issued EPP by workers	Eric Wu

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1 OVERVIEW

1.1 Current Design

Starting January 1, 2022, pregnant minors and non-minor dependents can receive a payment (EPP) three months before their due date, as stated in ACL 21-123. CA-231834 added 'Expectant Foster Youth' as a new Placement Type for identifying pregnant minors and non-minor dependents as payee. The SCR also added new Need Type and Pay Code 'Expectant Parent Payment' to issue and track EPP benefits.

1.2 Requests

Automate EPP benefits to be issued monthly in the amount of \$900.00 for the final three months of a minor/NMD's pregnancy.

1.3 Overview of Recommendations

1. Create a new daily batch to authorize EPP benefits.
2. Add a "Create Task" Automated Action that is triggered for worker to create a payee for expectant mothers without a Foster Care provider.

1.4 Assumptions

1. This SCR is not applicable to L.A. County since the county is issuing the Expectant Parent Payments outside the CalSAWS system. If the county chooses to change the business process and begin issuing benefits in CalSAWS, additional fund code mappings are needed.

2 RECOMMENDATIONS

2.1 Pregnancy Detail for Foster Care Expectant Mother

2.1.1 Overview

The existing Pregnancy Detail allow the users to add, edit, view, and remove pregnancy information for pregnant persons associated to the case.

2.1.2 Pregnancy Detail Page

The screenshot shows a web form titled "Pregnancy Detail". At the top, there is a legend: "*- Indicates required fields". To the right of the legend are three buttons: "Save and Add Another", "Save and Return", and "Cancel". Below the legend is a section titled "Change Reason" with a blue header. Inside this section, there are two fields: "New Change Reason: *" with a dropdown menu showing "Participant Provided - Written", and "New Reported Date: *" with a date input field showing "11/14/2023" and a calendar icon. Below this section is a larger form area with two columns. The left column contains: "Mother: *" with a dropdown menu showing "- Select -"; "Presumptive Eligibility Card Indicator:" with a dropdown menu; "Date Reported: *" with a date input field and a calendar icon; and "Pregnancy End Date:" with a date input field and a calendar icon. The right column contains: "Father:" with a dropdown menu; "Number of Unborn Children: *" with a text input field; "Due Date: *" with a date input field and a calendar icon; and "Verified: *" with a dropdown menu showing "Pending" and a "View" button. At the bottom of the form are three buttons: "Save and Add Another", "Save and Return", and "Cancel".

Figure 2.1.1 – Create Mode

2.1.3 Description of Changes

There are no updates to the page. Foster Care workers will save expectant mothers' pregnancy info on this page in order to trigger automated EPP.

Please see Figure 2.1.1 for existing fields of the page. The new EPP automation will utilize the following fields.

Mother: This field indicates the mother of the unborn infant(s) and will be used to determine the beneficiary/payee of the EPP.

Number of Unborn Children: this field indicates the number of children expected from the pregnancy and will be used to determine the amount

of the EPP. Please see [2.2 Foster Care Expectant Parent Payment Batch section](#) for more details.

Due Date: This field indicates the expected delivery date and will be used to determine the effective month(s) of the EPP. Please see [2.2 Foster Care Expectant Parent Payment Batch section](#) for more details.

Verified: This field indicates the verification status. 'Verified' status is required to trigger EPP automation.

Note: Only verified Due Dates that is on/after the current date will trigger EPP automation. If getting notified of a Pregnancy due day that is in the past, Worker will have to follow CIT 0018-22 and manually issue EPPs.

2.1.4 Page Location

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

2.1.5 Security Updates

No changes

2.1.6 Page Mapping

No changes

2.2 Foster Care Expectant Parent Payment Batch

2.2.1 Overview

Create a new daily batch that will grant EPP benefits for the last three months of a minor/NMD's pregnancy through Auxiliary Authorization.

2.2.2 Description of Change

1. Create a new daily batch that will identify expectant mothers who match the following criteria:
 - a. Pregnancy Due Date is between the batch date and the next 2 months. Pregnancy Due Date is verified. For example, the batch runs on 10/15/2023 will pick up Due Dates between 10/15/2023 to 12/31/2023.
 - b. The expectant mother is the Primary Applicant/Recipient of an active Foster Care program.
 - c. The batch has not authorized EPP yet for the Pregnancy Detail record.
 - d. The worker has not authorized EPP yet for the Pregnancy Due Date via Payment Requests. The Payment Requests will match the following:
 - i. Need Type is 'Expectant Parent Payment' or Pay Code is 'PP – Expectant Parent Payment'.
 - ii. Effective Month is within the last 4 month of the Due Date. For example, the system will consider 1/2024, 2/2024, 3/2024, and 4/2024 for the pregnancy due date of 4/1/2024 or 4/15/2024.Note: The system cannot identify a manually issued EPP if it is issued with other Need Type and Pay Code besides 'Expectant Parent Payment'; Therefore, if other criteria above are met, the batch will authorize another EPP for the customer.

Next, the batch will attempt to find a Foster Care resource representing the expectant mother as the payee with the following criteria:

- a. The Resource's Payee Name matches person's full name in a case-insensitive manner.
Note: Person's full name will be First Name + space + Last Name. If Middle Name is present, it will be First Name + space + Middle Initial + space + Last Name.
- b. The Resource's mailing address matches Person's mailing address.
- c. The Resource's Placement Type is 'Expectant Foster Youth' or 'Supervised Independent Living'.
- d. The Resource is approved for the county of the Foster Care program use.

If there is no match found, the system will create a task assigned to the Foster Care worker as specified in [Section 2.2 Foster Youth: Pregnancy Due Date Approaching Automated Action](#).

After determining the Payee, the batch will create an Auxiliary Authorization for issuing benefits. The record will have:

- a. Customer Non-Benefit: None
- b. Program: Foster Care
- c. Aid Code: Aid Code of the Foster Care program.
- d. Pay Code: Expectant Parent Payments
- e. Pay Details – Payee Type: Resource
- f. Name: The primary Foster Care applicant. (The payee determined by the batch)
- g. Issuance Method: Warrant
- h. Immediacy: Routine
- i. Payout Schedule – Issuance Business Day: 1
- j. Payout Schedule – Only Issue After Regular Benefit is Created: No

If the batch date is in the first of the last three month of the pregnancy:

- k. Payout Schedule – Begin Month: The batch month.
- l. Payout Schedule – End Month: The month of Due Date.
- m. Amount: \$900.00 per unborn child. The value will be multiplying \$900.00 by Number of Unborn Children, the field in 2.1 Pregnancy Detail section.
- n. Comments: The batch will provide information on how the amount is calculated in the format of "\$900.00 X {number} unborn children = {amount}". For example, benefits for twins will display "\$900.00 X 2 unborn children = \$1800.00".

If the batch date is within the last 2 months of the pregnancy:

- o. Payout Schedule – Begin Month and End Month: the month of the batch month.
- p. Amount: \$2700.00 per unborn child. The value will be multiplying \$2700.00 by Number of Unborn Children, the field mentioned in 2.1 Pregnancy Detail section.
- q. Comments: The batch will provide information on how the amount is calculated in the format of "\$2700.00 X {number} unborn children = {amount}". For example, benefits for twins will display "\$2700.00 X 2 unborn children = \$5400.00".

The status will be 'Approved' with the batch date as Status Date.

Note:

- a. To cancel EPP, User can void the auxiliary authorization record if no benefits is issued yet. If partial benefits are issued for a multi-

months Auxiliary Authorization, user can update “End Date” to prevent remaining benefits being issued.

- b. Worker will have to follow CIT 0018-22 and manually issue EPPs when getting notified of a Pregnancy due day that is in the past.

2.2.3 Execution Frequency

Daily Monday to Friday. Exclude holidays.

2.2.4 Key Scheduling Dependencies

Successor: Nightly Auxiliary Issuance Sweep

2.2.5 Counties Impacted

All non-Los Angeles Counties.

2.2.6 Data Volume/Performance

Approximately 30 records per month

2.2.7 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 Foster Youth: Pregnancy Due Date Approaching Automated Action

2.3.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation on the Automated Action Detail page (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages).

This section outlines the modifications required to implement an Automated Action in the CalSAWS System to identify minor expectant mothers without a Foster Care provider.

2.3.2 Foster Youth: Pregnancy Due Date Approaching Automated Action Automated Action Detail Mockup

Automated Action Detail		
<div>EditClose</div>		
Action Information		
Name:	Type:	Status: *
Foster Youth: Pregnancy Due Date Approaching	Create Task	Inactive
Program(s):	Run Date:	Source:
FC	Daily(Mon-Fri)	Batch
Scenario: A Foster Care minor expectant mother with an approaching pregnancy due date has been identified without a Foster Care provider payee.		
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 Foster Care provider/payee has not been found for the expectant mother with a due date of {PregnancyDueDate}.		
<div>EditClose</div>		

Figure 2.2.2 - 1 – Foster Youth: Pregnancy Due Date Approaching Automated Action View Mode

Automated Action Detail

Save And Return
Cancel

Action Information

Name: Foster Youth: Pregnancy Due Date Approaching	Type: Create Task	Status: * Inactive
Program(s): FC	Run Date: Daily(Mon-Fri)	Source: Batch

Scenario:
A Foster Care minor expectant mother with an approaching pregnancy due date has been identified without a Foster Care provider payee.

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 Foster Care provider/payee has not been found for the expectant mother with a due date of {PregnancyDueDate}.

Save And Return
Cancel

Figure 2.2.2 - 2 – Foster Youth: Pregnancy Due Date Approaching Automated Action Edit Mode

2.3.3 Description of Changes

Add the following Create Task type Automated Action to the CalSAWS system available to all Counties other than Los Angeles. 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. Foster Youth: Pregnancy Due Date Approaching
 - a. Action Information
 - i. Name: Foster Youth: Pregnancy Due Date Approaching
 - ii. Type: Create Task
 - iii. Status: Inactive
 - iv. Program(s): FC
 - v. Run Date: Daily(Mon-Fri)
 - vi. Source: Batch

- vii. Scenario: A Foster Care minor expectant mother with an approaching pregnancy due date has been identified without a Foster Care provider payee.
- 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 Foster Care provider/payee has not been found for the expectant mother with a due date of {PregnancyDueDate}.

If the Foster Care program already has a Task in an Assigned or In-Process status that resulted from this Automated Action, processing will not create an additional Task.

2.3.4 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.

2.3.5 Security Updates

N/A.

2.3.6 Page Mapping

N/A.

2.3.7 Page Usage/Data Volume Impacts

N/A.

2.4 Automated Regression Test

2.4.1 Overview

Create a new automated regression test script to verify the static details of the new Automated Action.

2.4.2 Description of Changes

Create a new automated script to verify the following details of the 'Foster Youth: Pregnancy Due Date Approaching' Automated Action:

Action Information:

1. Name
2. Type
3. Program(s)
4. Run Date
5. Source
6. Scenario

Task Information:

1. Long Description

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
N/A			

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.1	<p>The LRS shall include the ability to issue and maintain the history of the following benefits:</p> <ul style="list-style-type: none">a. Monthly benefits issued on a recurring basis, on either a calendar month or fiscal (cyclical) period;b. Emergency issuances (e.g., Immediate Need, Expedited Services and Emergency Aid Requests);c. Diversion payments;d. Supplemental benefits;e. Recovery refunds;f. Special needs payments;g. Retroactive payments;h. Vendor and/or Service Provider payments;i. Tokens and cash bus passes;j. Non-traditional/alternative transportation (e.g., car pool, taxi vouchers, and parking fees);k. Vouchers/cash for special payments, ancillary payments and other services;l. Interim assistance payments;m. Transportation payments;n. Petty cash;o. Cal-Learn bonus;p. Cal-Learn graduation bonus;q. Vehicle repair program;r. Additional transportation expense payments;s. Ancillary payments; andt. Child care payments.	Update system to automate EPP benefits.

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 OUTREACH

N/A

7 APPENDIX

N/A