

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-249942

San Mateo GAGR Changes

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/07/2024	1.0	Initial Draft	Farhat Ulain, Sridhar Mullapudi
03/14/2024	2.0	<p>Content Revision 1:</p> <ol style="list-style-type: none"> <li>1. Added two new screen shots to display validation message for the Comply Date field on Section 2.1.2</li> <li>2. Updated Section 2.1.3               <ol style="list-style-type: none"> <li>i. On #1.b.ii: The status reason for the program discontinuance that will be used to determine when the option of the Restoration of Aid will be available for the GA/GR Automated was updated.</li> <li>ii. Added #1.c.ii: For the Comply Date to be required.</li> <li>iii. Added #1.c.iv: Validation message to be applied for the Comply Date</li> <li>iv. Updated the Note section at the bottom of Section 2.1.3.</li> </ol> </li> </ol>	Kusnadi.E
03/19/2024	2.1	Content Revision 1: Added clarification in recommendation 2.1.3.1.b to effective date for admin rule.	Sridhar Mullapudi

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## Table of Contents

1	Overview .....	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions .....	6
2	Recommendations.....	7
2.1	Rescind Detail.....	7
2.1.1	Overview .....	7
2.1.2	Rescind Detail Mockup .....	7
2.1.3	Description of Changes .....	9
2.1.4	Page Location .....	10
2.1.5	Security Updates.....	10
2.1.6	Page Mapping.....	11
2.1.7	Accessibility .....	11
2.1.8	Page Usage/Data Volume Impacts .....	11
2.2	Add New Admin Rule for Restoration of Aid.....	11
2.2.1	Overview .....	11
2.2.2	Description of Changes .....	11
2.2.3	Programs Impacted .....	11
2.2.4	Performance Impacts .....	11
2.3	Update EDBC Logic for Restoration of Aid.....	11
2.3.1	Overview .....	11
2.3.2	Description of Changes .....	12
2.3.3	Programs Impacted .....	12
2.3.4	Performance Impacts .....	12
2.4	Add New Admin Rule for Earned Income Deduction.....	12
2.4.1	Overview .....	12
2.4.2	Description of Changes .....	12
2.4.3	Programs Impacted .....	13
2.4.4	Performance Impacts .....	13
2.5	Update Admin Rule for Earned Income Deduction.....	13
2.5.1	Overview .....	13

2.5.2	Description of Changes .....	13
2.5.3	Programs Impacted .....	13
2.5.4	Performance Impacts .....	13
2.6	Update EDBC Logic to Apply 20% Earned Income Deduction .....	13
2.6.1	Overview .....	13
2.6.2	Description of Changes .....	14
2.6.3	Programs Impacted .....	14
2.6.4	Performance Impacts .....	15
2.7	Add New Admin Rule for Vehicle Exemption .....	15
2.7.1	Overview .....	15
2.7.2	Description of Changes .....	15
2.7.3	Programs Impacted .....	15
2.7.4	Performance Impacts .....	15
2.8	Update EDBC logic for the New Vehicle Exemption Rule .....	15
2.8.1	Overview .....	15
2.8.2	Description of Changes .....	15
2.8.3	Programs Impacted .....	17
2.8.4	Performance Impacts .....	17
2.9	Add New Admin Rule for Primary Residence Exemption.....	17
2.9.1	Overview .....	17
2.9.2	Description of Changes .....	17
2.9.3	Programs Impacted .....	18
2.9.4	Performance Impacts .....	18
2.10	Update EDBC Logic to Exclude \$100K for a Primary Residence .....	18
2.10.1	Overview .....	18
2.10.2	Description of Changes .....	18
2.10.3	Programs Impacted .....	19
2.10.4	Performance Impacts .....	19
2.11	Update Property Limits for San Mateo County .....	19
2.11.1	Overview .....	19
2.11.2	Description of Changes .....	19
2.11.3	Programs Impacted .....	19
2.11.4	Performance Impacts .....	19
3	Requirements.....	20
3.1	Project Requirements.....	20

# 1 OVERVIEW

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## 1.1 Current Design

San Mateo GA county specific program is not aligned with state programs as well as offer a benefit to county residents.

## 1.2 Requests

San Mateo is proposing changes to the GA county specific program to make the program more aligned with state programs as well as offer a benefit to county residents.

1. Allow a restoration of aid for late periodic reports (QR7). Ability to restore the aid dependent on the date that the report is submitted and prorate the benefits based upon that completed date. This is current functionality for both CalWORKs and CalFresh with the SAR7.
2. Align with CF earned income deduction rules. Have the earned income deduction rules from CalFresh apply to GA program.
  - a. 20% if gross earned income
  - b. For self-employment - 20% of gross less actual business expenses (Expenses entered calculation completed by system similar to CalFresh) OR 40% of gross
3. New exemptions for assets
  - a. Exempt one vehicle, all additional vehicle(s) total equity must be below \$2200 or four times the GA grant limit will not be counted as property.
  - b. Exempt a primary residence up to \$100,000 in equity.
  - c. Update GA Property Limits
4. Add Restoration of Aid option for GAGR program when the program is discontinued due late reporting.

## 1.3 Overview of Recommendations

1. Allow a restoration of aid for late functionality for San Mateo GAGR automated solutions program.
2. Add new admin rule for Restoration of Aid rescind reason.
3. Add new EDBC logic to prorate benefit accurately when an application is rescinded with 'Restoration of Aid' reason.
4. Add New Admin Rule for Earned Income Deduction.
5. Turn on existing admin rule to apply 40% standard self-employment income deduction for SM county.
6. Update EDBC logic to apply 20% Earned income deduction.
7. Add New Admin Rule for Vehicle Exemption.
8. Update EDBC logic for the New Vehicle Exemption Rule.

9. Add new admin rule and logic for property exemptions and deductions.
10. Update EDBC Logic to Exclude \$100K for a Primary Residence.
11. Update motor vehicle and liquid property limits for San Mateo County.

#### **1.4 Assumptions**

1. Fields not modified within the description of changes will retain their current functionality.

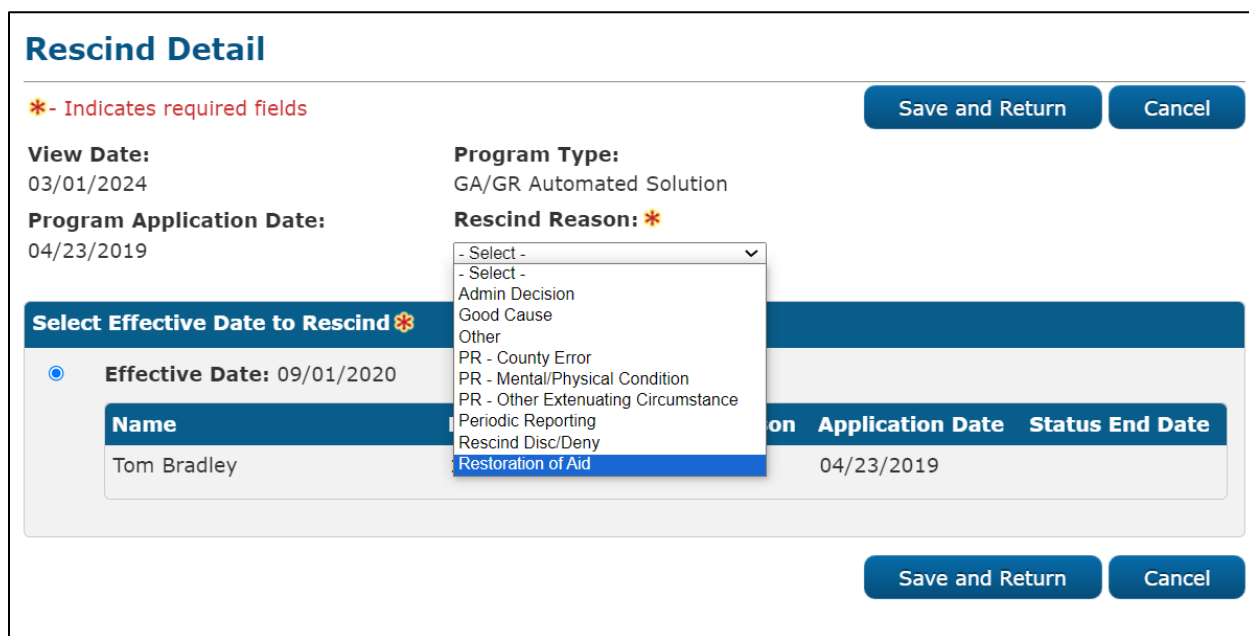
## 2 RECOMMENDATIONS

### 2.1 Rescind Detail

#### 2.1.1 Overview

This page allows the user to rescind a denial or cancellation of service to a participant/beneficiary or group of participants/beneficiaries based upon the effective date of the denial. Users can select a reason of rescinding the program on this page. This SCR will add a new option 'Restoration of Aid' to the Rescind Reason dropdown. It will allow the user to restore the aid for the GAGR Automated Solution.

#### 2.1.2 Rescind Detail Mockup



The mockup shows a 'Rescind Detail' form. At the top left, a red asterisk icon is followed by the text '\* - Indicates required fields'. On the top right, there are two buttons: 'Save and Return' and 'Cancel'. The form contains several fields: 'View Date:' with the value '03/01/2024', 'Program Application Date:' with the value '04/23/2019', and 'Program Type:' with the value 'GA/GR Automated Solution'. Below these, there is a 'Rescind Reason:' field with a red asterisk icon and a dropdown menu. The dropdown menu is open, showing a list of options: '- Select -', '- Select -', 'Admin Decision', 'Good Cause', 'Other', 'PR - County Error', 'PR - Mental/Physical Condition', 'PR - Other Extenuating Circumstance', 'Periodic Reporting', 'Rescind Disc/Deny', and 'Restoration of Aid'. To the left of the dropdown, there is a section titled 'Select Effective Date to Rescind' with a red asterisk icon. Below this title, there is a radio button selected next to 'Effective Date: 09/01/2020'. Below this, there is a table with the following columns: 'Name', 'Application Date', and 'Status End Date'. The table has one row with the name 'Tom Bradley' and the application date '04/23/2019'. At the bottom right, there are two buttons: 'Save and Return' and 'Cancel'.

**Rescind Detail**

\* - Indicates required fields

**View Date:**  
03/01/2024

**Program Application Date:**  
04/23/2019

**Program Type:**  
GA/GR Automated Solution

**Rescind Reason: \***

- Select -  
- Select -  
Admin Decision  
Good Cause  
Other  
PR - County Error  
PR - Mental/Physical Condition  
PR - Other Extenuating Circumstance  
Periodic Reporting  
Rescind Disc/Deny  
Restoration of Aid

**Select Effective Date to Rescind \***

☒ **Effective Date:** 09/01/2020

Name	Application Date	Status End Date
Tom Bradley	04/23/2019	

Save and Return Cancel

Save and Return Cancel

Figure 2.1.2-1 – Rescind Detail Page

## Rescind Detail

\* - Indicates required fields

**View Date:**  
03/01/2024

**Program Type:**  
GA/GR Automated Solution

**Program Application Date:**  
04/23/2019

**Rescind Reason: \***  

Restoration of Aid

**Comply Date: \***

**Select Effective Date to Rescind \***

☒ **Effective Date:** 09/01/2017

Name	DOB	Role	Role Reason	Application Date	Status End Date
Tom Bradley	06/06/1997	MEM		03/23/2019	

Save and Return

Cancel

Figure 2.1.2-2 – Rescind Detail Page

## Rescind Detail

\* - Indicates required fields

**View Date:**  
04/01/2024

**Program Type:**  
GA/GR Automated Solution

**Program Application Date:**  
07/11/2022

**Rescind Reason: \***  

Restoration of Aid

**Comply Date: \***  

02/01/2024

**Select Effective Date to Rescind \***

☒ **Effective Date:** 01/01/2024

Name	DOB	Role	Role Reason	Application Date	Status End Date
MOUSE MICKEY	12/02/2012	MEM		07/11/2022	

Save and Return

Cancel

This page took 0.48 seconds to load.

Figure 2.1.2-3a – Rescind Detail Page with Validation

## Rescind Detail

\*- Indicates required fields

Save and Return

Cancel

- **Comply Date** - Comply Date must be within the month of the rescinded Effective Date.

View Date:

04/01/2024

Program Type:

GA/GR Automated Solution

Program Application Date:

07/11/2022

Rescind Reason: \*

Restoration of Aid

Comply Date: \*

01/01/2023

### Select Effective Date to Rescind \*

☒ Effective Date: 01/01/2024

Name	DOB	Role	Role Reason	Application Date	Status End Date
MOUSE MICKEY	12/02/2012	MEM		07/11/2022	

Save and Return

Cancel

This Type 1 page took 0.48 seconds to load.

**Figure 2.1.2-3b – Rescind Detail Page with Validation**

### 2.1.3 Description of Changes

1. Add a new value 'Restoration of Aid' to the Rescind Reason dropdown.
  - a. 'Restoration of Aid' option will be displayed in an alphabetical order underneath Rescind Disc/Deny option as displayed in the figure 2.1.2-1.
  - b. This value will be displayed when the GAGR Automated Solution program is discontinued due to late periodic reports (QR7) and following conditions are met.
    - i. Admin Rule 'Allow Restoration of Aid for cases discontinued due to late QR7' is set to 'Yes'.
    - ii. Rescind Effective date is between the begin and end date of the admin rule set to 'Yes'.
    - iii. The GA/GR Automated Solution Detail page will display one of the discontinuance reasons given below in the Status Reason field of the Program Information block.
      - The Report was Not Received on Time
      - The Report is Incomplete
      - PR Incomplete Inc Report
      - PR Non-Compliance – Inc Report

Note: A new Admin Rule 'Allow Restoration of Aid for cases discontinued due to late QR7' will be added under Redetermination/Periodic Reporting → Periodic Reporting. With this SCR, this rule will be set to 'Yes' only for San Mateo County.

- c. Display the 'Comply Date' field when the 'Restoration of Aid' option is selected in the Rescind Reason dropdown as displayed in the figure 2.1.2-2.
  - i. It will be a dynamic field.
  - ii. The 'Comply Date' field will be required.
  - iii. This field will allow the user to enter aid restoration date for the GAGR Automated Solution.
  - iv. Apply the following validation message 'Comply Date – Comply Date must be within the month of the rescinded Effective Date.'
    - 1. Validation message will display when the date entered on the 'Comply Date' field is not in the Same Month and Year as the Effective Date (located on the Select Effective Date to Rescind section).
      - a. Validation message will display when user click on the Save and Return button and the date entered on the Comply Date does not have the same Month and Year as the Effective Date (found on the Select Effective Date to Rescind section).

**Note:** The Comply Date field will retain the current functionality and will allow the user to enter the date within the month of effective date which displays in the Effective Date to Rescind section. The Comply Date field being added for the GA/GR Automated Solution program will function the same way as the Comply Date field for the CalFresh program.

#### 2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Rescind Detail

#### 2.1.5 Security Updates

N/A

### **2.1.6 Page Mapping**

N/A

### **2.1.7 Accessibility**

N/A

### **2.1.8 Page Usage/Data Volume Impacts**

N/A

## **2.2 Add New Admin Rule for Restoration of Aid**

### **2.2.1 Overview**

Add new admin rule for to determine 'Restoration of Aid' under periodic reporting admin rules.

### **2.2.2 Description of Changes**

1. Add new admin rule under 'Periodic Reporting' in the 'County Rules Detail' page as follows:
  - a. 'Allow Restoration of Aid for cases discontinued due to late QR7.'
  - b. This rule shall be set to 'Yes' for San Mateo County only with a begin date 05/2024.
  - c. All other counties, this rule shall be set to 'No' with a begin date of 05/2024.

### **2.2.3 Programs Impacted**

GAGR automated solution

### **2.2.4 Performance Impacts**

None

## **2.3 Update EDBC Logic for Restoration of Aid**

### **2.3.1 Overview**

When GAGR program is rescinded with reason 'Restoration of Aid', update EDBC logic to calculate benefits from the restoration effective date as entered by the user during rescind for the effective month restored.

### 2.3.2 Description of Changes

1. Update EDBC budgeting logic to check if the application is rescinded with 'Restoration of Aid' reason.  
If the application is rescinded for the benefit month with 'Restoration of Aid' reason, update EDBC logic to budget and calculate the benefits effective 'comply date' for the benefit month.

**Example:**

If the application is rescinded with 'Restoration of Aid' reason for 08/2024 and a comply date of 08/10/2024. Running EDBC the benefits are prorated and calculated from 08/10/2024 till end of the months.

Aid Payment	Regular	
Full Month Aid Payment	\$	620.00
Dates to Prorate		10-31
Prorated Benefit Amount	\$	440.00
Final Aid Payment	\$	440.00
Overridden Aid Payment	\$	
Potential Benefit	=	440.00
Previous Potential Benefit	-	<a href="#">0.00</a>
Overpayment Adjustment Amount	-	<a href="#">0.00</a>
Authorized Amount	=	440.00

### 2.3.3 Programs Impacted

GAGR automated solution

### 2.3.4 Performance Impacts

None

## 2.4 Add New Admin Rule for Earned Income Deduction

### 2.4.1 Overview

Add new admin rule in the 'County Rules Detail' page under 'Earned Income' to apply 20% earned income deduction.

### 2.4.2 Description of Changes

1. Add new admin rule under 'Earned Income' in the 'County Rules Detail' page as follows:
  - a. 'Apply 20% Earned Income Deduction.'
  - b. This rule shall be set to 'Yes' for San Mateo County only with a begin date 05/2024.

- c. All other counties, this rule shall be set to 'No' with a begin date of 05/2024.

### **2.4.3 Programs Impacted**

GAGR automated solution

### **2.4.4 Performance Impacts**

None

## **2.5 Update Admin Rule for Earned Income Deduction**

### **2.5.1 Overview**

Update the existing admin rule in the 'County Rules Detail' page under 'Earned Income' to apply 40% standard self-employment income deduction.

### **2.5.2 Description of Changes**

1. update admin rule '40% Standard Self Employment Deduction.' under 'Earned Income' in the 'County Rules Detail' page as follows:
  - a. This rule shall be set to 'Yes' for San Mateo County only with a begin date 05/2024.

### **2.5.3 Programs Impacted**

GAGR automated solution

### **2.5.4 Performance Impacts**

None

## **2.6 Update EDBC Logic to Apply 20% Earned Income Deduction**

### **2.6.1 Overview**

When running GAGR EDBC update budgeting logic to apply 20% earned income deduction.

## 2.6.2 Description of Changes

1. Update EDBC logic to apply 20% earned income deduction on the total earned income calculated for the benefit month when the following conditions apply:
  - a. 'Apply 20% Earned Income Deduction.' Admin rule is set to 'Yes' for the benefit month.
  - b. Exists income that is classified as earned income for the benefit month.
2. Earned income deduction shall be displayed in the 'EDBC Person Line Item Detail -Earned Income' page accessed by the hyperlink for 'Earned Income' in the EDBC summary page.
  - a. The type shall display 'Earned Income Disregard'.
  - b. The description shall display '20% deduction of total earned income (\$'Total Earned income')'
  - c. The amount shall display a negative 20% of the total earned income amount.
  - d. Total shall display the total earned income less all the applicable disregards.

Note: the total displayed on this page shall also be display as 'Earned Income' in the 'GA/GR Automated Solution EDBC Summary' page with a hyperlink that shall redirect the user to 'EDBC Person Line Item Detail -Earned Income' page

### EDBC Person Line Item Detail - Earned Income

				Close	
Name	Type	Description	Amount		
Test, GR. 48M	Salary, Wages	(01/01/2024) \$500.00	\$ 500.00		
Test, GR. 48M	Self Employment	(01/01/2024) \$300.00	\$ 300.00		
	Earned Income Disregard	Self-Employment (/1 persons)	\$ -50.00		
	Earned Income Disregard	20% deduction of total earned income (\$750.00)	\$ -150.00		
			<b>Total</b>	<b>\$</b>	<b>750.00</b>
				Close	

3. When both 'Apply 20% Earned Income Deduction' and '40% Standard Self Employment Deduction.' admin rules are set to 'Yes'; both rules are applicable, the standard 40% Self Employment deduction shall be applied to the self-employment income and then the 20% earned income deduction shall apply to the total earned income.

## 2.6.3 Programs Impacted

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#### **2.6.4 Performance Impacts**

None

### **2.7 Add New Admin Rule for Vehicle Exemption**

#### **2.7.1 Overview**

Add new admin rule in the 'Exempt highest valued vehicle and Exclude 4X grant amount for vehicle.' under 'Vehicles Exemptions' to apply for San Mateo County.

#### **2.7.2 Description of Changes**

1. Add new admin rule under 'Vehicles Exemptions' in the 'County Rules Detail' page as follows:
  - a. 'Exempt highest valued vehicle and Exclude 4X grant amount of total vehicle property.'
  - b. This rule shall be set to 'Yes' for San Mateo County only with a begin date 05/2024.
  - c. All other counties, this rule shall be set to 'No' with a begin date of 05/2024.

#### **2.7.3 Programs Impacted**

GAGR automated solution

#### **2.7.4 Performance Impacts**

None

### **2.8 Update EDBC logic for the New Vehicle Exemption Rule**

#### **2.8.1 Overview**

Update EDBC logic to exempt highest valued vehicle and exclude 4X grant limit amount of the total vehicle property value when budgeting motor vehicle property limit.

#### **2.8.2 Description of Changes**

1. Update vehicle budgeting logic as follows when the GAGR recipient has countable motor vehicle property (as defined by the county) and has the admin rule 'Exempt highest valued vehicle and Exclude 4X grant amount of total vehicle property.' Set to 'Yes' for the benefit month:

- a. Exempt one highest valued vehicle from EDBC budgeting.
  - b. Deduct 4X grant amount from the total motor vehicle property before comparing against the property limit to determine eligibility.
2. When displaying the motor vehicle property total on the EDBC summary page, the total shall display the total amount after the 4x grant amount deduction.
3. When the user navigates into the 'Property Detail' page, each motor vehicle included in the motor vehicle total shall be displayed in individual line items as per current functionality, but the 'Countable Amount' shall display the countable value of the property minus the deduction. If the countable value of the property is less than the deduction amount, the remaining deduction shall be applied to the next vehicle property (if one exists) until all the deduction is used or there is no countable motor vehicle property.

Example:

If there are 3 motor vehicles of value:

- a. MV1 – Value \$10,000.00
- b. MV2 – Value \$2428.00
- c. MV3 - Value \$ 1000.00

MV1 shall be exempted motor vehicle property. MV2 and MV3 shall be included in calculating the total amount. Total deduction of \$2928 shall be applied to MV2, since MV2 value is below the deduction limit, the remaining \$500 of the deduction amount shall be deducted from MV3. The countable amount for MV3 shall be displayed as \$500 (as shown below).

#### **EDBC Summary Page:**

<b>Motor Vehicle Property:</b>	
Amount:	\$ <u>500.00</u>
Property Limit:	\$ 1,464.00
Result:	Pass

#### **Property Detail Page:**

##### **Property Detail**

					Close
Owner	Property Type	Ownership	Value	Countable Amount	
Test, GR. 48M	Automobile	100.0%	\$2428.00	\$0.00	
Test, GR. 48M	Automobile	100.0%	\$1000.00	\$500.00	
			<b>Total</b>	\$500.00	

Close

4. Add new vehicle property exemption amount in CT10664 to capture the 4X grant limit used to calculate the motor vehicle exempt amount when determining the total motor vehicle amount for the benefit month.

Column Name	Value
-------------	-------

SHORT_DECODE_NAME	Vehicle Exemption Limit
LONG_DECODE_NAME	Vehicle Exemption Limit
Begin Date	01/01/1000
End Date	12/31/9999
County Code	41
Household size	1
Resource limit	2928
GA GR Resource Limit Categories	New value from below recommendation

5. Add new resource limit category in CT10701 to identify the above motor vehicle exemption amount.

Column Name	Value
SHORT_DECODE_NAME	Vehicle Exemption Limit
LONG_DECODE_NAME	Vehicle Exemption Limit

### 2.8.3 Programs Impacted

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### 2.8.4 Performance Impacts

None

## 2.9 Add New Admin Rule for Primary Residence Exemption

### 2.9.1 Overview

Add new admin rule in the 'County Rules Detail' page under 'Real Property Primary Residence' to apply \$100,000 exemption for a primary residence.

### 2.9.2 Description of Changes

1. Add new admin rule under 'Real Property Primary Residence' in the 'County Rules Detail' page as follows:
  - a. 'Exclude \$100K for Primary Residence.'
  - b. This rule shall be set to 'Yes' for San Mateo County only with a begin date 05/2024.
  - c. All other counties, this rule shall be set to 'No' with a begin date of 05/2024.

### 2.9.3 Programs Impacted

GAGR automated solution

### 2.9.4 Performance Impacts

None

## 2.10 Update EDBC Logic to Exclude \$100K for a Primary Residence

### 2.10.1 Overview

Update EDBC budget to exclude \$100K for a Primary Residence.

### 2.10.2 Description of Changes

1. Update EDBC logic to exclude \$100,000 equity (Value – Encumbrance) for a primary residence when all the following conditions are met:
  - a. 'Exclude \$100K for Primary Residence.' admin rule is set to 'Yes' for the benefit month.
  - b. Has any of the following real property with usage 'Home':
    - i. House
    - ii. Mobile Home
    - iii. Motor Home
  - c. If multiple properties qualify the above condition for 'Primary Residence', the exclusion applies to the highest equity value property only.

Note: The above exclusion shall not result in a negative value for primary residence.

2. When displaying the Real property total on the EDBC summary page, the total shall display the total amount after the \$100,000 exclusion on a primary residence if one exists.
3. When the user navigates into the 'Property Detail' page, the property detail for the primary residence for which the \$100,000 exclusion is applied shall display the amount after the exclusion on the equity is applied under 'Countable Amount'.

**Example:** if a property of type 'House' with usage 'Home' with value '\$150,000' and 'Encumbrance' of '\$49,000' exists on a case, and admin rule to exclude \$100,000 for a primary residence is set to 'Yes' running EDBC, the real property calculation would be displayed as below.

**EDBC Summary Page:**

<b>Real Property:</b>	
Amount:	\$ 1,000.00
Property Limit:	\$ 1,464.00
Result:	Pass

**Property Detail Page:**  
**Property Detail**

					Close
Owner	Property Type	Ownership	Value	Countable Amount	
Marquez, Luis A. 48M	House	100.0%	\$150,000.00	\$1,000.00	
Total				\$1,000.00	
					Close

### 2.10.3 Programs Impacted

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### 2.10.4 Performance Impacts

None

## 2.11 Update Property Limits for San Mateo County

### 2.11.1 Overview

Update property limits for San Manteo County.

### 2.11.2 Description of Changes

1. Update following property limits identified on the EDBC summary page:
  - a. Motor Vehicle Property (CT10664\_30):
    - i. End date the existing property limit effective 04/30/2024.
    - ii. Add new property limit effective 05/01/2024 to high date with limit \$1464.
  - b. Liquid Property (CT10664\_N3):
    - i. End date the existing property limit effective 04/30/2024.
    - ii. Add new property limit effective 05/01/2024 to high date with limit \$1464.

### 2.11.3 Programs Impacted

GAGR automated solution

### 2.11.4 Performance Impacts

None

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.11	The LRS shall treat income and resources based on program-specific rules.	Adding new admin rules to calculate: <ul style="list-style-type: none"><li>• 20% earned income deduction.</li><li>• Vehicle exemptions</li><li>• \$100,000 primary residence exclusion.</li><li>• Updates to property limits.</li></ul>
2.8.1.15	The LRS shall determine the effective start and end date of eligibility and the Redetermination, Recertification, and/or Annual Agreement period for all individuals for all applicable programs.	Adding new logic to calculate the benefits and EDBC budgets based on comply date when a discontinued application is rescinded with reason 'Restoration of Aid'.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-230837

ACL 22-67 - System updates to support STAT 47  
to match CalFresh E&T rule

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor O'Donnell, Thomas Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/01/2023	1.0	Initial Draft	Connor O'Donnell, Thomas Lazio
02/06/2024	2.0	Adding SET activity to Online and Eligibility Sections	Connor O'Donnell, Thomas Lazio
02/07/2024	3.0	Updating the following activities in the Online and Eligibility Sections: <ul style="list-style-type: none"> <li>• WBL Pre-apprenticeship (WBLPA)</li> <li>• WBL Pre-apprenticeship Subs. (WBLPA-SUB)</li> <li>• WBL Apprenticeship (WBLA)</li> <li>• WBL Apprenticeship Subs. (WBLA-SUB)</li> </ul>	Connor O'Donnell, Thomas Lazio
02/12/2024	4.0	Added assumptions 5 and 6  Added recommendations 2.1.3.3 and 2.2.3.3	Connor O'Donnell, Thomas Lazio
03/25/2024	5.0	Added section 2.4	William Baretsky

## Table of Contents

1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions .....	4
2	Recommendations.....	5
2.1	Select Activity Page.....	5
2.1.1	Overview .....	5
2.1.2	Select Activity Page Mockup .....	5
2.1.3	Description of Changes .....	5
2.1.4	Page Location .....	6
2.1.5	Security Updates.....	6
2.1.6	Page Mapping.....	6
2.1.7	Page Usage/Data Volume Impacts .....	6
2.2	Service Detail Page.....	7
2.2.1	Overview .....	7
2.2.2	Service Detail Page Mockup .....	7
2.2.3	Description of Changes .....	7
2.2.4	Page Location .....	8
2.2.5	Security Updates.....	8
2.2.6	Page Mapping.....	8
2.2.7	Page Usage/Data Volume Impacts .....	8
2.3	Eligibility – Customer Activities Countable for ABAWD Work Requirement .....	9
2.3.1	Overview .....	9
2.3.2	Description of Changes .....	9
2.3.3	ABAWD Work Requirement Detail Page Mockup.....	11
2.3.4	Programs Impacted .....	11
2.3.5	Performance Impacts .....	11
2.4	Automated Regression Test.....	12
2.4.1	Overview .....	12
2.4.2	Description of Changes .....	12
3	Requirements.....	13

3.1	Project Requirements.....	13
4	Outreach.....	13
4.1	Lists.....	13

## 1 OVERVIEW

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This SCR makes updates based on ACL 22-26, 22-41, 22-67 and 22-67E to align activities in the CalSAWS system with what is appropriate according to policy.

### 1.1 Current Design

As a result of the Employment and Training (E&T) Final Rule, CDSS will need to update the STAT 47 report to align with the new CalFresh employment and training program components.

Report changes to the STAT 47 will be developed in SCR CA-264616.

### 1.2 Requests

Update customer activities to match the changes indicated in ACL 22-26, 22-41, 22-67 and 22-67E.

### 1.3 Overview of Recommendations

1. Online: Update the Select Activities page with the necessary modifications to the selectable activities.
2. Online: Update the Service Detail page with the necessary modifications to the selectable services.
3. Eligibility: Update ABAWD Work Requirement Detail page to display new customer activities.
4. Eligibility: Update EDBC logic for counting hours towards the ABAWD Work Requirement to include new customer activities.
5. Online: Create lists of the cases and resources impacted by the changes to activities and services.

### 1.4 Assumptions

1. Fields not mentioned to be modified within the description of changes will retain their current functionality and logic.
2. Supervised Job Search (Non-Qualifying) customer activity will be used for Non-ABAWD placements and ABAWDs in non-qualifying component placements. This standalone customer activity will not count towards ABAWD work requirement hours.

3. Report changes to the STAT 47 will be developed in SCR CA-264616.
4. For records that currently use activities or services that will be removed with this SCR, the activity or service will remain visible on the record.
5. The counties will be responsible for 'end dating' existing records with removed activities and services. The listings in Section 4.1 are to assist counties with this effort.
6. Existing records with activity/service type of 'CFET Retention Services' will show as 'Job Retention' as of the implementation of this SCR.

## **2 RECOMMENDATIONS**

---

### **2.1 Select Activity Page**

#### **2.1.1 Overview**

The Select Activity page is used to indicate which activities a customer is participating in. Certain activities have been added and removed per the ACLs indicated in Section 1.2, these updates reflect those changes.

#### **2.1.2 Select Activity Page Mockup**

N/A

#### **2.1.3 Description of Changes**

1. Remove the following Type values from the Select Activity page:
  - a. Category: CFET
    - i. Type: Job Club
    - ii. Type: Job Search
    - iii. Type: Self Initiated Workfare
2. Add the following Type values to the 'CFET' Category on the Select Activity page:
  - a. EDU Prog. Basic (EPB)
  - b. EDU Prog. Career (EPC)
  - c. EDU Prog. English Language (EPEL)
  - d. EDU Prog. Integrated (EPI)
  - e. EDU Prog. Work Readiness Training (EPWRT)
  - f. Orientation/Assessment (OA)
  - g. Self-Employment Training (SET)
  - h. Supv. Job Search (Non-Qualifying)
  - i. Supv. Job Search (WIOA and Veterans)

- j. Work Activity (WA)
  - k. WBL Internship (WBLI)
  - l. WBL Internship Subs. (WBLI-SUB)
  - m. WBL On-the-Job Training (WBLOJT)
  - n. WBL Other (WBLO)
  - o. WBL Other Subs. (WBLO-SUB)
  - p. WBL Pre-apprenticeship (WBLPA)
  - q. WBL Pre-apprenticeship Subs. (WBLPA-SUB)
  - r. WBL Apprenticeship (WBLA)
  - s. WBL Apprenticeship Subs. (WBLA-SUB)
  - t. WBL Transitional Jobs (WBLTJ)
  - u. WBL Transitional Jobs Subs. (WBLTJ-SUB)
3. Relabel the 'CFET Retention Services' Type in the 'CFET' Category to instead have a Type of 'Job Retention'.
  4. Ensure that activities that are being removed will continue to be visible on records that have that activity selected.

Technical Note: The activities being removed will only be removed from the CFET category; these activities will still be visible when relevant non-CFET categories are selected.

#### **2.1.4 Page Location**

- **Global: Empl. Services**
- **Local: Activities**
- **Task: Customer Activities**

#### **2.1.5 Security Updates**

N/A

#### **2.1.6 Page Mapping**

N/A

#### **2.1.7 Page Usage/Data Volume Impacts**

N/A

## 2.2 Service Detail Page

### 2.2.1 Overview

The Service Detail page is used to indicate which services a resource is participating in. Certain services have been added and removed per the ACLs indicated in Section 1.2, these updates reflect those changes.

### 2.2.2 Service Detail Page Mockup

N/A

### 2.2.3 Description of Changes

1. Remove the following Type values from the Service Detail page:
  - a. Category: CFET
    - i. Type: Job Club
    - ii. Type: Job Search
    - iii. Type: Self Initiated Workfare
2. Add the following Type values to the 'CFET' Category on the Service Detail page:
  - a. EDU Prog. Basic (EPB)
  - b. EDU Prog. Career (EPC)
  - c. EDU Prog. English Language (EPEL)
  - d. EDU Prog. Integrated (EPI)
  - e. EDU Prog. Work Readiness Training (EPWRT)
  - f. Orientation/Assessment (OA)
  - g. Self-Employment Training (SET)
  - h. Supv. Job Search (Non-Qualifying)
  - i. Supv. Job Search (WIOA and Veterans)
  - j. Work Activity (WA)
  - k. WBL Internship (WBLI)
  - l. WBL Internship Subs. (WBLI-SUB)
  - m. WBL On-the-Job Training (WBLOJT)
  - n. WBL Other (WBLO)
  - o. WBL Other Subs. (WBLO-SUB)
  - p. WBL Pre-apprenticeship (WBLPA)
  - q. WBL Pre-apprenticeship Subs. (WBLPA-SUB)
  - r. WBL Apprenticeship (WBLA)
  - s. WBL Apprenticeship Subs. (WBLA-SUB)
  - t. WBL Transitional Jobs (WBLTJ)
  - u. WBL Transitional Jobs Subs. (WBLTJ-SUB)
3. Relabel the 'CFET Retention Services' Type in the 'CFET' Category to instead have a Type of 'Job Retention'.

4. Ensure that services that are being removed will continue to be visible on records that have that service selected.

Technical Notes:

The services being removed will only be removed from the CFET category; these services will still be visible when relevant non-CFET categories are selected.

The removal of these service types from the dropdown list on the Service Detail page will also remove them from other pages that contain Service Category and Type, including 'Resource Search', 'Select Resource', 'Select Provider/Agency', and 'Select Service and Provider'.

#### **2.2.4 Page Location**

- **Global: Resource Databank**
- **Local: Resources**
- **Task: Services**

#### **2.2.5 Security Updates**

N/A

#### **2.2.6 Page Mapping**

N/A

#### **2.2.7 Page Usage/Data Volume Impacts**

N/A

## 2.3 Eligibility – Customer Activities Countable for ABAWD Work Requirement

### 2.3.1 Overview

The existing logic for determining whether the Able-Bodied Adult Without Dependents (ABAWD) has met the Work Requirements will be updated to include the new countable customer activities added with this SCR.

### 2.3.2 Description of Changes

1. The new customer activities displayed in the table below will be added to the existing ABAWD Work Requirement Detail page. The table columns describe the following information:
  - i. **Name – Page Display:** This defines the verbiage that will be used display the name of the customer activity on the existing ABAWD Work Requirement Detail page (see Mockup in Section 2.2.3 below).
  - ii. **Customer Service Type:** This identifies the countable customer service type activity.
  - iii. **Program Association:** This identifies the program associated with the customer service type activity.
2. The new customer activities displayed in the table below will be added to the existing **Non-Limited** logic for counting hours towards the ABAWD Work Requirement and will display under '**Non-Limited Activity Hours**' on the existing ABAWD Work Requirement Detail page (see Mockup in Section 2.3.3 below).

**Note:** Non-Limited = Actual hours entered on the Customer Activity Detail Page for the activity are counted as allowable hours towards ABAWD work requirement.

### Countable Customer Activities

Figure 2.3.2.2.1 Customer Activities Table

Name - Page Display	Customer Service Type	Program Association
EDU Prog. Basic	EDU Prog. Basic (EPB)	CFET
EDU Prog. Career	EDU Prog. Career (EPC)	CFET
EDU Prog. English Language	EDU Prog. English Language (EPEL)	CFET
EDU Prog. Integrated	EDU Prog. Integrated (EPI)	CFET
EDU Prog. Work Readiness Training	EDU Prog. Work Readiness Training (EPWRT)	CFET

Name - Page Display	Customer Service Type	Program Association
Self-Employment Training	Self-Employment Training (SET)	CFET
Supv. Job Search (WIOA and Veterans)	Supv. Job Search (WIOA and Veterans)	CFET
Work Activity	Work Activity (WA)	CFET
WBL Internship	WBL Internship (WBLI)	CFET
WBL Internship Subs.	WBL Internship Subs. (WBLI-SUB)	CFET
WBL On-the-Job Training	WBL On-the-Job Training (WBLOJT)	CFET
WBL Other	WBL Other (WBLO)	CFET
WBL Other Subs.	WBL Other Subs. (WBLO-SUB)	CFET
WBL Pre-apprenticeship	WBL Pre-apprenticeship (WBLPA)	CFET
WBL Pre-apprenticeship Subs.	WBL Pre-apprenticeship Subs. (WBLPA-SUB)	CFET
WBL Apprenticeship	WBL Apprenticeship (WBLA)	CFET
WBL Apprenticeship Subs.	WBL Apprenticeship Subs. (WBLA-SUB)	CFET
WBL Transitional Jobs	WBL Transitional Jobs (WBLTJ)	CFET
WBL Transitional Jobs Subs	WBL Transitional Jobs Subs. (WBLTJ-SUB)	CFET

### 2.3.3 ABAWD Work Requirement Detail Page Mockup

**ABAWD Requirement Person Summary**

Close

**Name:**  
Smith, John 26M

**Work Requirement Hours:**  
80

**Total Hours Completed:**  
41.5

**Work Requirement Status:**  
Not Met

**Household Workfare Requirement Hours:**  
17

**Total Household Workfare Hours:**  
22

**Household Workfare Requirement Status:**  
Met

**Employment Hours**

**Total Monthly Hours:**19

Name	Type	Monthly Hours
Employer #1	Self-Employment	8
Employer #2	Unsubsidized	11

**Non-Limited Activity Hours**

**Total Monthly Hours:**15

Name	Monthly Hours
Activity #1	10
Activity #2	5

**Limited Activity Hours**

**Total Monthly Hours:**7.5

**Allowable Monthly Hours:** 7.5

**Actual Monthly Hours:**8

Name	Monthly Hours
Job Club	3
Job Search	5

**Work Registration Exemptions**

**Type**  
No Data Found

**Workfare Activities**

Name	Monthly Hours
Workfare #1	9
Workfare #2	13

Close

### 2.3.4 Programs Impacted

CF

### 2.3.5 Performance Impacts

N/A

## 2.4 Automated Regression Test

### 2.4.1 Overview

Create new automated regression test scripts to verify the new and updated Type values are available under Category 'CFET' on the Select Activity and Service Detail pages.

### 2.4.2 Description of Changes

1. Create new regression scripts to verify that each of the following Type values are available when Category 'CFET' is selected on the Select Activity page:
  - a. EDU Prog. Basic (EPB)
  - b. EDU Prog. Career (EPC)
  - c. EDU Prog. English Language (EPEL)
  - d. EDU Prog. Integrated (EPI)
  - e. EDU Prog. Work Readiness Training (EPWRT)
  - f. Job Retention
  - g. Orientation/Assessment (OA)
  - h. Self-Employment Training (SET)
  - i. Supv. Job Search (Non-Qualifying)
  - j. Supv. Job Search (WIOA and Veterans)
  - k. Work Activity (WA)
  - l. WBL Internship (WBLI)
  - m. WBL Internship Subs. (WBLI-SUB)
  - n. WBL On-the-Job Training (WBLOJT)
  - o. WBL Other (WBLO)
  - p. WBL Other Subs. (WBLO-SUB)
  - q. WBL Pre-apprenticeship (WBLPA)
  - r. WBL Pre-apprenticeship Subs. (WBLPA-SUB)
  - s. WBL Apprenticeship (WBLA)
  - t. WBL Apprenticeship Subs. (WBLA-SUB)
  - u. WBL Transitional Jobs (WBLTJ)
  - v. WBL Transitional Jobs Subs. (WBLTJ-SUB)
2. Create new regression scripts to verify that each of the following Type values are available when Category 'CFET' is selected on the Service Detail page:
  - a. EDU Prog. Basic (EPB)
  - b. EDU Prog. Career (EPC)
  - c. EDU Prog. English Language (EPEL)
  - d. EDU Prog. Integrated (EPI)
  - e. EDU Prog. Work Readiness Training (EPWRT)
  - f. Job Retention
  - g. Orientation/Assessment (OA)
  - h. Self-Employment Training (SET)
  - i. Supv. Job Search (Non-Qualifying)

- j. Supv. Job Search (WIOA and Veterans)
- k. Work Activity (WA)
- l. WBL Internship (WBLI)
- m. WBL Internship Subs. (WBLI-SUB)
- n. WBL On-the-Job Training (WBLOJT)
- o. WBL Other (WBLO)
- p. WBL Other Subs. (WBLO-SUB)
- q. WBL Pre-apprenticeship (WBLPA)
- r. WBL Pre-apprenticeship Subs. (WBLPA-SUB)
- s. WBL Apprenticeship (WBLA)
- t. WBL Apprenticeship Subs. (WBLA-SUB)
- u. WBL Transitional Jobs (WBLTJ)
- v. WBL Transitional Jobs Subs. (WBLTJ-SUB)

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.28.3.9	The LRS shall provide summary report on component(s) participation, selected and/or sorted by work participation program component or Cal-Learn program component status, User, unit, section, and/or office.	This SCR will allow users to select work participation program activities that will be mapped to the latest components added for the STAT 47 report with ACL 22-67.

### 4 OUTREACH

---

#### 4.1 Lists

These two lists will indicate the individuals with activities and resources with services that have been deprecated by this SCR.

**Standard Columns:**

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

1. **List Name:** List of Individuals on Deprecated Activities

**List Criteria:** List all cases that have an individual linked to an activity that was removed in Section 2.1 when that activity has a status of 'Active' with an end date greater than or equal to 07/01/2024.

**Additional Column(s):**

- Activity Category
- Activity Type
- Activity Status
- Activity Begin Date
- Activity End Date
- Person Name

**Frequency:** One-time

2. **List Name:** List of Resources Using Deprecated Services

**List Criteria:** List all resources linked to a service that was removed in Section 2.2 when that service has a status of 'Pending' or 'Active' with an end date greater than or equal to 07/01/2024.

**Additional Column(s):**

- Service Category
- Service Type
- Service Status
- Service Begin Date
- Service End Date
- Resource Name
- Resource ID
- Resource Address

**Frequency:** One-time

The lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-230837



California Statewide Automated Welfare System

## **Design Document**

CA-252755

Add NOA Fragments in Threshold Languages for  
CalWORKS NOA Generation (M40-129B)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shanika Franklin
	Reviewed By	Ramya YK

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/11/2023	1.0	Initial Document	Shanika Franklin
03/25/2024	2.0	Content Revision for variable Immediate Need Type	Shanika Franklin

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Add Threshold languages to reason code A246A. ....	5
	2.1.1 Overview .....	5
	2.1.2 Form/NOA Verbiage .....	5
	2.1.3 Form/NOA Variable Population .....	5
	2.1.4 Form/NOA Generation Conditions.....	5
3	Supporting Documents .....	5
4	Requirements.....	6
	4.1 Project Requirements.....	6

# 1 OVERVIEW

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The purpose of this change is to add Threshold Languages for CalWORKS NOA M40-129B- Full Payment, Approve- Immediate Need.

## 1.1 Current Design

M40-129B (11/09) NOA fragment A246A (Approved-Immediate Need) is available in English and Spanish.

## 1.2 Requests

1. Add Threshold languages to M40-129B with NOA code A246A (Snippet ID - 6216).

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

2. Translate the Immediate Need Type variable in Threshold languages Spanish, Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.3 Overview of Recommendations

1. Add Threshold languages to M40-129B with NOA code A246A (Snippet ID - 6216).

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

2. Translate the Immediate Need Type variable in Threshold languages Spanish, Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remain the same and are not being updated.
2. The NOA template remains the same and is not being updated.

## 2 RECOMMENDATIONS

---

### 2.1 Add Threshold languages to reason code A246A.

#### 2.1.1 Overview

Add Threshold languages to NOA code A246A - APRVD: IMMEDIATE NEED \$200.

**Reason Fragment Name and ID:** CW\_AP\_IMM\_NEED\_APP\_FULL\_A246  
(Fragment ID: 6216)

**State Form/NOA:** M40-129B (11/09)

**Current NOA Template:** CW\_NOA\_TEMPLATE (ID: 3026)

**Current Program(s):** CalWORKs

**Current Action Type:** Approval

**Include NA Back 9:** Yes

**Existing Languages:** English & Spanish

#### 2.1.2 Form/NOA Verbiage

Add M40-129B NOA fragments in Threshold languages.

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

**NOA Mockups/Examples:** Supporting Documents #1

#### 2.1.3 Form/NOA Variable Population

Translate the Immediate Need Type variable in Threshold languages Spanish, Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

#### 2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1.	NOA	M40-129B NOA fragments	Fragments_Verbiage.xlsx Fragment_Variable_Verbiage.xlsx

## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li></ul>	M40-129B NOA Reason fragment is being added in available Threshold languages.

	<p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-257327

Sunset Worklist Pages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/02/2023	1.0	Initial Revision	Vallari Bathala
03/18/2024	1.1	Add Section 2.3 Task Pup-up Pages detailing the requirement to restrict Users from manually closing Authorization Tasks.	Vallari Bathala
		Update Section 1.2 Requests and Section 1.3 Overview of Recommendations with new requirements preventing Users from manually closing Authorization Tasks	

## Table of Contents

1	Overview .....	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions .....	5
2	Recommendations.....	6
2.1	Sunset the Worklist pages .....	6
2.1.1	Overview .....	6
2.1.2	Navigation Mockup.....	6
2.1.3	Description of Changes .....	6
2.1.4	Page Location .....	7
2.1.5	Security Updates.....	7
2.1.6	Page Mapping.....	8
2.1.7	Accessibility .....	8
2.1.8	Page Usage/Data Volume Impacts .....	8
2.2	Guided Navigation Data Change .....	9
2.2.1	Overview .....	9
2.2.2	Description of Changes .....	9
2.3	Task Pop-Up Pages.....	9
2.3.1	Overview .....	9
2.3.2	Description of Changes .....	9
2.3.3	Page Validations .....	9
2.3.4	Page Location .....	10
2.3.5	Security Updates.....	10
2.3.6	Page Mapping.....	10
2.3.7	Accessibility .....	10
2.3.8	Page Usage/Data Volume Impacts .....	10
3	Supporting Documents .....	11
4	Requirements.....	12
4.1	Project Requirements.....	12
5	Migration Impacts .....	13
6	Outreach.....	14

7	Appendix.....	15
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# 1 OVERVIEW

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This design outlines deactivating the Worklist pages within the CalSAWS System.

## 1.1 Current Design

The CalSAWS System includes a series of Worklist pages that allow for management of Tasks. The CalSAWS System also includes a series of pages within the Task Pop-Up window that allow for management of Tasks.

Enhancement CA-253708 (Consolidate the Worklist Pages into the Task Pop-Up Pages) integrated Worklist page specific functionalities into the Task Pop-Up pages.

The Worklist pages are accessible at:

Global: Case Info

Local: Tasks

The Work Order pages are located within the Worklist navigation. Although the other pages within Worklist navigation are associated to Task Management functionality, the Work Order pages are not associated to Task Management.

## 1.2 Requests

1. Sunset the Worklist pages in the CalSAWS System.
2. Relocate the Work Order pages to Case Info: Referral.
3. Restrict Users from manually closing Authorization Tasks.

## 1.3 Overview of Recommendations

1. Remove the Worklist pages.
2. Relocate the Work Order pages.
3. Add validation in Task Pop-up pages preventing Users from closing Authorization Tasks manually.

## 1.4 Assumptions

1. N/A

## 2 RECOMMENDATIONS

---

### 2.1 Sunset the Worklist pages

#### 2.1.1 Overview

With the deployment of CA-253708, the functionality available on the Worklist pages is now available as part of the Task Pop-Up pages in the CalSAWS System.

#### 2.1.2 Navigation Mockup

Case Info	Eligibility
New Application	
Case Summary	
Worker Assignment	
Customer Schedule	
e-Tools	
Referral	

**Figure 2.1.2-1 – Case Info Global Navigation**

#### 2.1.3 Description of Changes

1. Remove the following local navigation option because the Work Order page will be relocated with Recommendation #2, and the remaining Task Management Task Navigation options (Worklist Summary, Worklist, Worklist PR RE and Approvals) will no longer be accessible leaving a deprecated/empty Local Navigation option:

Global: Case Info

Local: Tasks

2. Relocate the Work Order Task Navigation option which previously existed at Case Info > Tasks to:

Global: Case Info

Local: Referral

The Work Order Task Navigation option will display below the IHSS Referral Search option.

The existing "WorkOrderView" security right will continue to allow access to the Work Order pages once moved to this location.

## 2.1.4 Page Location

- **Global: Case Info**
- **Local: Tasks**
- **Task: N/A**

## 2.1.5 Security Updates

1. Remove the "WorkloadSummaryView" security right from the listed security groups because this security right is deprecated with the removal of the Worklist pages:

Security Right	Right to Group Mapping
WorkloadSummaryView	<ul style="list-style-type: none"> <li>• Contact Summary Edit</li> <li>• Contact Summary View</li> <li>• File Clearance</li> <li>• ICT Transfer Edit</li> <li>• IHSS Referral Case Link</li> <li>• My Tasks View</li> <li>• Person Redetermination</li> <li>• Person View</li> <li>• Select Companion Case Person</li> </ul>

The "WorkloadSummaryView" Security Right will no longer be available for search within the Security Right field of the Select Security Group page.

Note: No Security Roles will be impacted with this Security update since there is no removal or addition of Security Groups.

2. Remove the "Worklist Summary Select Worker" security group. This is a deprecated security group that is also not necessary with the removal

of the Worklist Summary page. Removal of the Security Group will also remove any associations of this Security Group to any project or county-maintained Security Roles. The "WorklistSummarySelectWorker" Security Right will no longer be available for search within the Security Right field of the Select Security Group page.

3. Remove the "Task Supervisor" security group. This security group is only used to restrict reassignment capabilities on the Worklist page, which becomes deprecated with the removal of the Worklist page. Removal of the Security Group will also remove any associations of this Security Group to any project or county maintained Security Roles. The "TaskSupervisor" Security Right will no longer be available for search within the Security Right field of the Select Security Group page.

4. Work Order navigation/security:

Technical Note: The existing Work Order Task Navigation is currently visible when one of the following Security Groups are assigned "Work Order View", "Work Order Edit" or "Work Order Reassign". More technically, the "WorkOrderView" security right is evaluated to determine display of this Task Navigation option and will continue to grant access to the pages at the new Case Info > Referral navigation.

5. Remove references that populate the "Page Name" search field of the Select Security Group page to no longer include the following pages:
  - Worklist Summary
  - Worklist
  - Worklist PR/RE

### **2.1.6 Page Mapping**

Update Page Mapping to remove all references to the Worklist Summary, Worklist, Worklist PR RE and Approvals pages.

### **2.1.7 Accessibility**

N/A.

### **2.1.8 Page Usage/Data Volume Impacts**

N/A

## 2.2 Guided Navigation Data Change

### 2.2.1 Overview

Tasks that have Guided Navigation enabled display the Task Type as a hyperlink. When the hyperlink is clicked, the main CalSAWS window is launched into Guided Navigation, which is a flow through a specific series of pages related to that particular Task. When this Guided Navigation is initiated, the current state of the navigation for the particular Task and user is stored so that if the user logs out, or times out and returns at a later time to re-initiate Guided Navigation, the page flow will continue where the user left off. Part of this stored context includes a completion page when the navigation completes. Most Guided Navigation that is initiated from the Worklist page ends back on the Worklist page. Guided Navigation that is initiated from the Task Pop-Up page ends on the CalSAWS Homepage.

### 2.2.2 Description of Changes

For Guided Navigation context data that is saved for Assigned/In-Process Tasks that were initiated from the Worklist pages, update the Completion page within the saved guided navigation context to be the CalSAWS Homepage. This is necessary so that once the Worklist pages are deactivated, if this guided navigation is resumed, the routing will not attempt to complete onto the Worklist pages.

## 2.3 Task Pop-Up Pages

### 2.3.1 Overview

The Worklist page included a validation message informing Users that Authorization Tasks cannot be completed manually. CA-253708, which consolidated Worklist page specific functionalities into the Task Pop-Up pages to allow for management of Tasks, did not include this validation as part of the updates to the Task Pop-Up pages.

### 2.3.2 Description of Changes

1. Implement validation listed in section [2.3.3 Page Validations](#).

### 2.3.3 Page Validations

Add a page validation if the User tries to complete an Authorization Task in the following scenarios:

1. The User clicks the "Complete" button on one or more Authorization Task in the My Tasks page, or Task Search page.
2. The User changes the 'Status' to "Complete" in the Task Detail page.

"Tasks requiring Supervisor/Deputy Authorization cannot be marked "Complete" manually."

#### 2.3.4 Page Location

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

Task Detail, My Tasks, Task Search pages are accessible through Utility bar's Tasks Option.

#### 2.3.5 Security Updates

N/A

#### 2.3.6 Page Mapping

N/A

#### 2.3.7 Accessibility


N/A

#### 2.3.8 Page Usage/Data Volume Impacts

N/A

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Online	Security Matrix	 CA-257327 Security Matrix.xls

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.1.3.3	3. The LRS shall provide CSOs the ability to create or modify a security profile for a group of Users online in real-time, so that those Users may have immediate access to a function added to a profile, or immediate denial of access to a function removed from the profile.	<ol style="list-style-type: none"><li>1. Remove access to the Worklist pages.</li><li>2. Disable the Security groups, Security rights and Roles for the Worklist pages.</li></ol>

## 5 MIGRATION IMPACTS

---

N/A.

## 6 OUTREACH

---

N/A.

## 7 APPENDIX

---

N/A.

# CalsAWS

California Statewide Automated Welfare System

## **Design Document**

CA-263040

Task Mgmt: Admin Functionality for Mass Task  
Closure

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/20/2023	1.0	Initial Revision	Vallari Bathala, Justin Dobbs
03/14/2024	1.1	<p>Section 2.3.2 Task Exports Mockup</p> <ol style="list-style-type: none"> <li>Updated the figure name to "My Tasks" instead of "My Search".</li> </ol> <p>Section 2.5.2 Task Upload: Task Closure Template Mockup</p> <ol style="list-style-type: none"> <li>Updated "Task Number" column mockup to be "Task ID" in Figure 2.5.2-1 – Closure Template.</li> <li>Updated "Task Number" references to be "Task ID" in Figure 2.5.2-2 – Closure Template – Instructions Sheet Mockup.</li> </ol> <p>Section 2.5.3 Description of Changes</p> <ol style="list-style-type: none"> <li>Added basic instructions for the Instructions sheet to match Figure 2.5.2-2 – Closure Template – Instructions Sheet Mockup.</li> <li>Updated "Task Number" references to be "Task ID" in the Instructions table.</li> </ol> <p>Section 2.8.3 Description of Changes</p> <ol style="list-style-type: none"> <li>Removed the hyperlink in Figure 2.8.2 – Task Upload Detail Page – Closure Preview Complete – View Mode.</li> <li>Added requirement to remove hyperlink from Task Information section for Closure Templates.</li> </ol>	Vallari Bathala

		<p>Section 2.9.2 Task Upload Detail Page – Task Closure Upload – Upload Complete Mockup</p> <ol style="list-style-type: none"> <li>1. Removed the hyperlink in Figure 2.9.2 – Task Upload Detail Page – Closure Upload Complete.</li> </ol> <p>Section 2.9.3 Description of Changes</p> <ol style="list-style-type: none"> <li>1. Added requirement to remove hyperlink from Task Information section for Closure Templates.</li> <li>2. Updated the pop-up confirmation mock-up verbiage to use the word “Completed” instead of “Complete”.</li> <li>3. Corrected the link to ‘Preview Information’ Description of Changes section in the document.</li> </ol> <p>Section 2.10.2 Preview Errors Page Mockup</p> <ol style="list-style-type: none"> <li>1. Updated column header to ‘Task ID’ in Figure 2.10.2 – Preview Errors Page.</li> </ol> <p>Section 2.12.2 Preview Processing</p> <ol style="list-style-type: none"> <li>1. Updated the Task Status to “Completed” instead of “Complete”.</li> <li>2. Added clarification that the Newly Assigned Indicator will be set to No when Tasks are set to “Completed” or “Void”.</li> </ol> <p>Section 2.2.4 Page Validations</p> <ol style="list-style-type: none"> <li>1. Added a validation if the User attempts to search the Task Search page using a Task ID containing non-numerical values.</li> </ol> <p>Section 3 SUPPORTING DOCUMENTS</p>	
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		1. Replaced the Closure Template excel file with latest updated file.	

## Table of Contents

1	Overview .....	9
1.1	Current Design.....	9
1.2	Requests.....	9
1.3	Overview of Recommendations.....	9
1.4	Assumptions .....	9
2	Recommendations.....	10
2.1	Task Pop-Up: Task Detail Page .....	10
2.1.1	Overview .....	10
2.1.2	Task Detail Page Mockup .....	10
2.1.3	Description of Changes .....	12
2.1.4	Page Location .....	12
2.1.5	Security Updates.....	12
2.1.6	Page Mapping.....	13
2.1.7	Accessibility .....	13
2.1.8	Page Usage/Data Volume Impacts .....	13
2.2	Task Pop-Up: Task Search Page .....	13
2.2.1	Overview .....	13
2.2.2	Task Search Mockup .....	14
2.2.3	Description of Changes .....	14
2.2.4	Page Validations .....	15
2.2.5	Page Location .....	15
2.2.6	Security Updates.....	15
2.2.7	Page Mapping.....	15
2.2.8	Accessibility .....	15
2.2.9	Page Usage/Data Volume Impacts .....	15
2.3	Task Exports .....	15
2.3.1	Overview .....	15
2.3.2	Task Exports Mockup .....	15
2.3.3	Description of Changes .....	16
2.3.4	Page Location .....	16
2.3.5	Security Updates.....	17
2.3.6	Page Mapping.....	17
2.3.7	Accessibility .....	17

2.3.8	Page Usage/Data Volume Impacts .....	17
2.4	Task Upload Pop-Up: Templates Page .....	17
2.4.1	Overview .....	17
2.4.2	Task Upload Pop-Up: Templates Mockup.....	17
2.4.3	Description of Changes .....	17
2.4.4	Page Location .....	17
2.4.5	Security Updates.....	18
2.4.6	Page Mapping.....	18
2.4.7	Accessibility .....	18
2.4.8	Page Usage/Data Volume Impacts .....	18
2.5	Task Upload Template: Closure.....	18
2.5.1	Overview .....	18
2.5.2	Task Upload: Task Closure Template Mockup .....	18
2.5.3	Description of Changes .....	19
2.5.4	Page Location .....	22
2.5.5	Security Updates.....	22
2.5.6	Page Mapping.....	22
2.5.7	Accessibility .....	22
2.5.8	Page Usage/Data Volume Impacts .....	22
2.6	Task Upload Detail Page – Task Closure Upload - Status New .....	22
2.6.1	Overview .....	22
2.6.2	Task Upload Detail Page – Task Closure Upload - Status New Mockup...	23
2.6.3	Description of Changes .....	24
2.6.4	Page Location .....	24
2.6.5	Security Updates.....	24
2.6.6	Page Mapping.....	24
2.6.7	Accessibility .....	24
2.6.8	Page Usage/Data Volume Impacts .....	24
2.7	Task Upload Detail Page – Task Closure Upload – Preview Processing .....	25
2.7.1	Overview .....	25
2.7.2	Task Upload Detail Page – Task Closure Upload – Preview Processing Mockup.....	25
2.7.3	Description of Changes .....	25
2.7.4	Page Location .....	25
2.7.5	Security Updates.....	25

2.7.6	Page Mapping.....	26
2.7.7	Accessibility .....	26
2.7.8	Page Usage/Data Volume Impacts .....	26
2.8	Task Upload Detail Page – Task Closure Upload – Preview Complete .....	26
2.8.1	Overview .....	26
2.8.2	Task Upload Detail Page – Task Closure Upload – Preview Complete Mockup.....	26
2.8.3	Description of Changes .....	27
2.8.4	Page Location .....	28
2.8.5	Security Updates.....	28
2.8.6	Page Mapping.....	28
2.8.7	Accessibility .....	28
2.8.8	Page Usage/Data Volume Impacts .....	28
2.9	Task Upload Detail Page – Task Closure Upload – Upload Complete.....	28
2.9.1	Overview .....	28
2.9.2	Task Upload Detail Page – Task Closure Upload – Upload Complete Mockup.....	29
2.9.3	Description of Changes .....	29
2.9.4	Page Location .....	30
2.9.5	Security Updates.....	30
2.9.6	Page Mapping.....	30
2.9.7	Accessibility .....	31
2.9.8	Page Usage/Data Volume Impacts .....	31
2.10	Preview Errors Page.....	31
2.10.1	Overview .....	31
2.10.2	Preview Errors Page Mockup .....	31
2.10.3	Description of Changes .....	31
2.10.4	Page Location .....	32
2.10.5	Security Updates.....	32
2.10.6	Page Mapping.....	32
2.10.7	Accessibility .....	32
2.10.8	Page Usage/Data Volume Impacts .....	32
2.11	Preview Processing.....	32
2.11.1	Overview .....	32
2.11.2	Preview Processing .....	32

2.12	Preview Approved/Upload Processing .....	35
2.12.1	Overview .....	35
2.12.2	Preview Processing .....	35
2.13	Void Processing .....	35
2.13.1	Overview .....	35
2.13.2	Preview Processing .....	35
3	Supporting Documents .....	37
4	Requirements .....	38
4.1	Project Requirements .....	38
5	Migration Impacts .....	39
6	Outreach .....	40
7	Appendix .....	41

# 1 OVERVIEW

---

This design outlines modifications to Task Management functionality within the CalSAWS System to allow mass closure of Tasks via the Task Upload framework.

## 1.1 Current Design

Within the CalSAWS System, the Task Pop-Up: Task Search page is the only page which allows more than one Task to be Completed simultaneously. The page allows one or more Tasks to be selected and then processed with an Action of "Complete" to close out the Tasks. This processing is limited to the number of Tasks that are displayed on the page.

The Task Upload functionality provides a framework to upload and process an action on up to 10 thousand Tasks. This functionality only supports Task creation. There is no functionality available for counties to close Tasks in mass.

## 1.2 Requests

1. Modify the Task Upload functionality to allow for upload information for Tasks to be closed in mass.
2. Modify CalSAWS Task Management pages as necessary to support the Task Upload modifications.

## 1.3 Overview of Recommendations

1. Incorporate a "Closure" template to the Task Upload pages and processing framework that will allow counties to upload up to 10 thousand Tasks to be closed (Completed or Voided) in mass.
2. Add a unique identifier (Task ID) display to the Task Detail page.
3. Modify Task Export templates with the addition of Task ID column.

## 1.4 Assumptions

1. SCR CA-253606 will update Qlik ID to Task ID in the Task Management Dashboards. The SCR will be implemented with the same release as this enhancement and will be reflected in the Task Management Dashboard.
2. The Task Upload List will reflect the new "Closure" Template Type automatically without modification.
3. The Task Upload processing flow as defined in Figure 2.1.2 of SCR CA-214901 will not be modified.

## 2 RECOMMENDATIONS

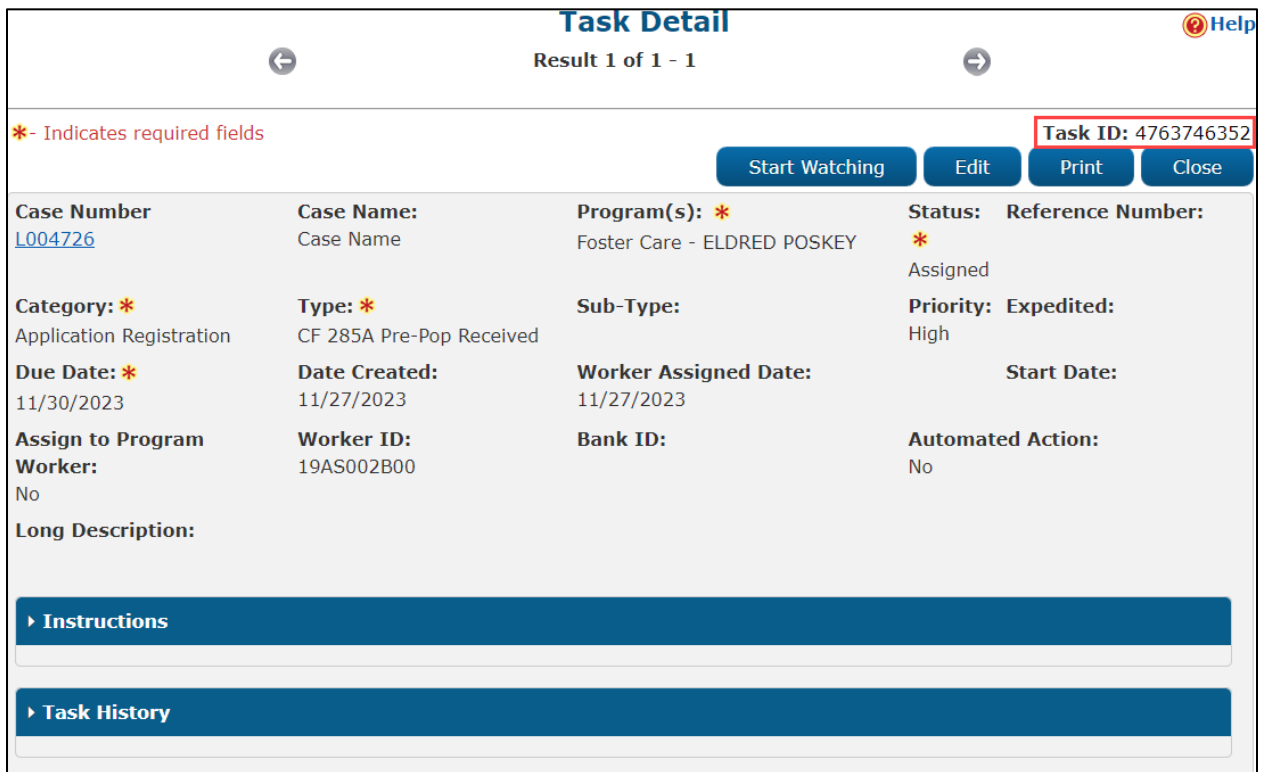
This section will outline recommendations to introduce Task mass closure functionality to the CalSAWS System.

### 2.1 Task Pop-Up: Task Detail Page

#### 2.1.1 Overview

This section describes recommendations to include a Task ID attribute on the Task Detail page.

#### 2.1.2 Task Detail Page Mockup



**Task Detail** Help

Result 1 of 1 - 1

\*- Indicates required fields

Task ID: 4763746352

Start Watching Edit Print Close

<b>Case Number</b> <a href="#">L004726</a>	<b>Case Name:</b> Case Name	<b>Program(s): *</b> Foster Care - ELDRED POSKEY	<b>Status:</b> *	<b>Reference Number:</b>
<b>Category: *</b> Application Registration	<b>Type: *</b> CF 285A Pre-Pop Received	<b>Sub-Type:</b>	<b>Priority:</b> High	<b>Expedited:</b>
<b>Due Date: *</b> 11/30/2023	<b>Date Created:</b> 11/27/2023	<b>Worker Assigned Date:</b> 11/27/2023	<b>Start Date:</b>	
<b>Assign to Program Worker:</b> No	<b>Worker ID:</b> 19AS002B00	<b>Bank ID:</b>	<b>Automated Action:</b> No	
<b>Long Description:</b>				

▸ Instructions

▸ Task History

Figure 2.1.2-1 – Task Detail page – View Mode

## Task Detail

Result 1 of 1 - 1

\*- Indicates required fields

Task ID: 4763746352

Save and Return
Save
Cancel

<b>Case Number:</b> L004726	<b>Case Name:</b> Case Name	<b>Program(s): *</b> Foster Care - ELDRED POSKEY	<b>Status: *</b> Assigned
<b>Category: *</b> Application Registration	<b>Type: *</b> CF 285A Pre-Pop Received	<b>Sub-Type:</b> <div style="border: 1px solid #ccc; padding: 2px;">▼</div>	<b>Priority:</b> High
<b>Due Date: *</b> 11/30/2023	<b>Date Created:</b> 11/29/2023	<b>Worker Assigned Date:</b> 11/29/2023	<b>Expedited:</b> <div style="border: 1px solid #ccc; padding: 2px;">▼</div>
<b>Assign to Program Worker:</b> No	<b>Worker ID:</b> 90AS002D00	<b>Bank ID:</b>	<b>Automated Action:</b> No

**Long Description:**

▶ Instructions

▶ Task History

Figure 2.1.2-2 – Task Detail page – Edit Mode

## Task Detail

Result 1 of 1 - 1

\*- Indicates required fields

Task ID: 4763746352

Start Watching
Edit
Print
Close

✓ General

<b>Case Number</b>	<b>Case Name:</b>	<b>Program(s):</b>	<b>Status: *</b> Assigned
<b>Category: *</b> Case Update	<b>Type: *</b> Eight Month Follow-Up	<b>Sub-Type:</b>	<b>Priority:</b> High
<b>Due Date: *</b> 11/30/2023	<b>Date Created:</b> 11/27/2023	<b>Worker Assigned Date:</b> 11/27/2023	<b>Expedited:</b>
<b>Assign to Program Worker:</b> No	<b>Worker ID:</b> 00AS003D00	<b>Bank ID:</b>	<b>Start Date:</b>
			<b>Automated Action:</b> No

**Long Description:**

▶ Instructions

▶ Task History

Figure 2.1.2-3 – Task Detail page – General View Mode

**Task Detail**
Help

← Result 1 of 1 - 1 →

\* - Indicates required fields

✓ **General**

**Task ID:** 4763746352

Save and Return

Save

Cancel

<b>Case Number:</b>	<b>Case Name:</b>	<b>Program(s):</b>	<b>Status:</b> <span style="color: red;">*</span>	<b>Reference Number:</b>
			<div style="border: 1px solid black; padding: 2px;">Assigned</div>	
<b>Category:</b> <span style="color: red;">*</span>	<b>Type:</b> <span style="color: red;">*</span>	<b>Sub-Type:</b>	<b>Priority:</b>	<b>Expedited:</b>
<div style="border: 1px solid black; padding: 2px;">Case Update</div>	<div style="border: 1px solid black; padding: 2px;">Eight Month Follow-Up</div>	<div style="border: 1px solid black; padding: 2px;">▼</div>	High	<div style="border: 1px solid black; padding: 2px;">▼</div>
<b>Due Date:</b> <span style="color: red;">*</span>	<b>Date Created:</b>	<b>Worker Assigned Date:</b>		<b>Start Date:</b>
<div style="border: 1px solid black; padding: 2px;">11/30/2023</div>	11/27/2023	11/27/2023		<div style="border: 1px solid black; padding: 2px;"></div>
<b>Assign to Program Worker:</b>	<b>Worker ID:</b>	<b>Bank ID:</b>	<b>Automated Action:</b>	
<div style="border: 1px solid black; padding: 2px;">No</div>	<div style="border: 1px solid black; padding: 2px;">00AS003D00</div> <div style="border: 1px solid black; padding: 2px 10px;">Select</div>	<div style="border: 1px solid black; padding: 2px;"></div> <div style="border: 1px solid black; padding: 2px 10px;">Select</div>	No	

**Long Description:**

▶ Instructions

▶ Task History

**Figure 2.1.2-4 – Task Detail page – General Edit Mode**

### 2.1.3 Description of Changes

1. Update the Task Detail page to include a Task ID attribute. This field is read only, is not modifiable and is a unique identifier for each individual Task.
  - a. This attribute value will be available for all pre-existing Tasks and for all Tasks created from the time of this enhancement forward.
  - b. When the page is in Create mode, this attribute will not be displayed; a Task ID is not assigned until successful creation of a new Task.

### 2.1.4 Page Location

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

Page is accessible through Utility bar's Tasks Option.

### 2.1.5 Security Updates

N/A

### **2.1.6 Page Mapping**

Update page mapping for the new Task ID field.

### **2.1.7 Accessibility**

The following accessibility enhancements have been identified:

- iFrames must have an accessible name.

### **2.1.8 Page Usage/Data Volume Impacts**

N/A

## **2.2 Task Pop-Up: Task Search Page**

### **2.2.1 Overview**

This section outlines the modifications to the Task Search page to allow searching by Task ID.

## 2.2.2 Task Search Mockup

Task Search

Help

\*- Indicates required fields

Refine Your Search

Search

Display Mode:

Standard

Case Number:

Select

Program:

Worker ID:

00AS002D00

Select

Bank ID:

Select

Office Name:

Select

Unit ID:

00

Status:

Assigned/In Process

Category:

Type:

Sub-Type:

Priority:

Newly Assigned:

Expedited:

Due Date

From:

To:

Advanced Search

Assign Date

From:

To:

Completed/Voiced/Expired Date

From:

To:

Created Date

From:

To:

Created By:

Select

Long Description:

General:

Language:

Submit Month:

Task ID:

Results per Page:

100

Search

Add Task

Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	Date Appended
No Data Found									

Add Task

Figure 2.2.2 – Task Search page

## 2.2.3 Description of Changes

### Advanced Search

1. Update the Task Pop-Up: Task Search page to include a Task ID search field allowing a search to be performed for a specific Task ID. When a Task ID is provided, the search will look specifically for the provided Task ID. Results will be displayed if the Task ID is valid for the county. Additional search parameters (if entered) will not apply.

## 2.2.4 Page Validations

1. "Task ID – The value must be an integer between 1 and 9999999999."
  - a. Add a validation if the User attempts to search using a Task ID containing non-numerical values.

## 2.2.5 Page Location

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

Page is accessible through Utility bar's Tasks Option.

## 2.2.6 Security Updates

N/A

## 2.2.7 Page Mapping

Update page mapping for the new Task ID field.

## 2.2.8 Accessibility

N/A

## 2.2.9 Page Usage/Data Volume Impacts

N/A

## 2.3 Task Exports

### 2.3.1 Overview

This section outlines the modifications to the Task Management related Export templates to include a Task ID column.

### 2.3.2 Task Exports Mockup

	A	B	C	D	E	F	G	H	I
1	Task ID	Case Number	Case Name	Program	Language	Start Date	Due Date	Category	Type
2	476346352	L004726	Case Name	FC	English		11/30/2023	APPLICATION REGISTRATION	CF 285A Pre-Pop Recel
3									
4									
5									

Figure 2.3.2-1 – Task Search/My **Tasks** Task Export

	A	B	C	D	E	F	G
1	Task ID	Case Numb	Case Name	Program	Due Date	Category	Type
2	476346352	L004726	Case Name	FC	11/30/2023	APPLICATION REGISTRATION	CF 285A Pre-Pop Received
3							
4							
5							
6							
7							

**Figure 2.3.2-2 – Task Reassignment Results Export**

	A	B	C	D	E	F	G	H	I
1	Task ID	Case Numb	Case Name	Worker ID	Bank ID	Program	Completed/Void	Category	Type
2	476346352	L004726	Case Name	00AB00C00		FC	Complete	APPLICATION REGISTRATION	CF 285A Pre-Pop Received
3									
4									
5									
6									
7									

**Figure 2.3.2-3 – QA/QC Task Sample Results Export**

### 2.3.3 Description of Changes

1. Task ID column – Add a column to show the Task ID value for each Task in the exported list.
  - a. The new column will be available as the first column (column A) in the following Export templates:
    - i. Task Search
    - ii. My Tasks
    - iii. Task Reassignment Results
    - iv. QA/QC Task Sample Results

### 2.3.4 Page Location

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

Page is accessible through Utility bar's Tasks Option.

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

Click Task Reassignment hyperlink in the expandable Tasks section of the Task navigation bar to access the Task Reassignment Search page then a Task Reassignment Title. Click the View Results button to access the Task Reassignment Results List page in View mode.

- **Global:** Special Units
- **Local:** Quality Review
- **Task:** QA/QC Tasks

Click the Title hyperlink to access the QA/QC Task Sample Detail page in View mode then the View Results button to access the QA/QC Task Sample Results List page.

### 2.3.5 Security Updates

N/A

### 2.3.6 Page Mapping

N/A

### 2.3.7 Accessibility

N/A

### 2.3.8 Page Usage/Data Volume Impacts

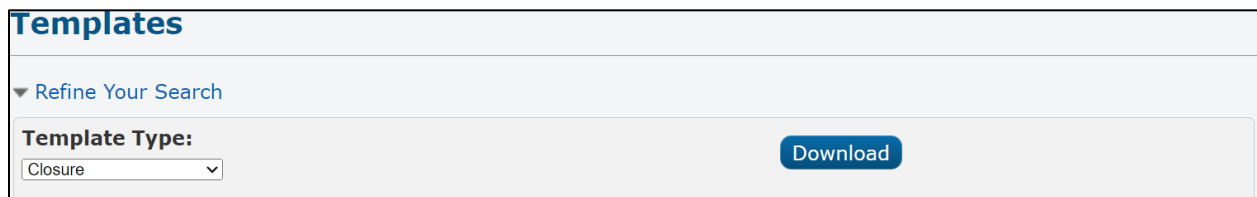
N/A

## 2.4 Task Upload Pop-Up: Templates Page

### 2.4.1 Overview

The Templates page has a dedicated tab in the Task Upload Pop-Up window that will allow users to download Task Closure template.

### 2.4.2 Task Upload Pop-Up: Templates Mockup



**Templates**

▼ Refine Your Search

**Template Type:**

Closure ▼

Download

Figure 2.4.2 – Templates Page

### 2.4.3 Description of Changes

1. Template Type – Add a “Closure” template to the dropdown menu that can be downloaded to be used for a Task Upload instruction. See Section 2.5 for the specifics of the Closure template.

### 2.4.4 Page Location

- **Global:** Admin Tools

- **Local:** Admin
- **Task:** Tasks > Task Upload
  - Select the Templates tab at the top of the Task Upload Pop-Up page.

## 2.4.5 Security Updates

N/A

## 2.4.6 Page Mapping

N/A

## 2.4.7 Accessibility

N/A

## 2.4.8 Page Usage/Data Volume Impacts

N/A

# 2.5 Task Upload Template: Closure

## 2.5.1 Overview

This section defines a new Task Upload template to facilitate mass Task closure.

## 2.5.2 Task Upload: Task Closure Template Mockup

	A	B	C	D	E	F	G
1							
2	Task Upload						
3	Closure						
4							
5							
	Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Complete/Void
6	12345678	1765374		Intake		11/17/2023	Completed
7	76483746	5489785					Completed
8	26354789		CW	Document Received	Income	11/27/2023	Completed
9	17837467	8896588					Void

**Figure 2.5.2-1 – Closure Template**

	A	B	C
1			
2	<b>Instructions</b>		
3	Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.		
	When providing a Case Number attribute for a Task in template, the following fields are required:		
	a. Task ID		
	b. Case Number		
	c. Complete/Void		
	When NOT providing a Case Number attribute for a Task in template, the following fields are required:		
	a. Task ID		
	b. Task Type		
	c. Task Sub-Type (If applicable)		
	d. Due Date		
4	e. Complete/Void		
5	Column	Required	Instructions
6			Enter the Task ID of the Task.
7	Task ID	Yes	Task ID can be found on the Task Detail page and on the Task Export list.
8	Case Number	No	Enter a 7 digit CalSAWS Case Number that is valid for the county and Task ID.
9	Program	No	This field is optional and only serves as a reference data point in the template.
10	Task Type	No	This field is only required when a Case Number value is not provided. If a Case Number is provided, this field only serves as a reference data point in the template.
11	Task Sub-Type	No	This field is only required when a Case Number value is not provided, and a Task Sub-Type is applicable for the Task. If a Case Number is provided, this field only serves as a reference data point in the template.
12	Due Date	No	This field is only required when a Case Number value is not provided. If required, enter the Due Date of the Task formatted as "mm/dd/yyyy". If a Case Number is provided, this field only serves as a reference data point in the template.
13			Enter one of the following Task Status values in this field:
14			Completed
15	Complete/Void	Yes	Void

**Figure 2.5.2-2 – Closure Template – Instructions Sheet Mockup**

### 2.5.3 Description of Changes

1. This template contains the basic information necessary to close Tasks. The Template will also include an "Instructions" sheet that will contain general instructions for each field that the User may reference during data entry.

**a. Add the following basic instructions:**

Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.

When providing a Case Number attribute for a Task in template, the following fields are required:

a. Task ID

b. Case Number

c. Complete/Void

When NOT providing a Case Number attribute for a Task in template, the following fields are required:

a. Task ID

b. Task Type

c. Task Sub-Type (If applicable)

d. Due Date

e. Complete/Void

b. Add the following column specific instructions:

Column	Required	Instructions
Task ID	Yes	Enter the Task ID of the Task. Task ID can be found on the Task Detail page and on the Task Export list.
Case Number	No	Enter a 7 digit CalSAWS Case Number that is valid for the county and Task ID.
Program	No	This field is optional and only serves as a reference data point in the template.
Task Type	No	This field is only required when a Case Number value is not provided. If a Case Number is provided, this field only serves as a reference data point in the template.
Task Sub-Type	No	This field is only required when a Case Number value is not provided, and a Task Sub-Type is applicable for the Task. If a Case Number is provided, this field only serves as a reference data point in the template.
Due Date	No	This field is only required when a Case Number value is not provided. If required, enter the Due Date of the Task formatted as "mm/dd/yyyy". If a Case Number is provided, this field only serves as a reference data point in the template.
Complete/Void	Yes	Enter one of the following Task Status values in this field: Complete

		Void
--	--	------

2. The "Closure" template "Tasks" sheet will contain the following columns:

Column	Required	Definition
Task ID	Yes	The Task ID unique identifier for the Task.
Case Number	No	<p>The 7digit Case Number of the Case that the Task is associated to.</p> <p>If Case Number is provided, the only other required field is "Complete/Void".</p> <p>If Case Number is NOT provided, the "Task Type", "Task Sub-Type" (if applicable), "Due Date" and "Complete/Void" fields are required.</p>
Program	No	The Program associated to the Task. This attribute serves as a reference data point in the template for the User. There are no format restrictions to this field.
Task Type	No	<p>The Name of the Task Type that the Task is associated to.</p> <p>If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification.</p> <p>If Case Number is NOT provided, the preview processing will validate that the Task Type is valid for the provided Task ID.</p>
Task Sub-Type	No	<p>The Name of the Task Sub-Type that the Task is associated to (if applicable).</p> <p>If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification.</p> <p>If Case Number is NOT provided and this field contains a value, the preview processing will validate that the Task Sub-Type is valid for the provided Task ID.</p>
Due Date	No	The Due Date of the Task.

		<p>If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification.</p> <p>If Case Number is NOT provided, the preview processing will validate that the Due Date is valid for the provided Task ID.</p>
Complete/Void	Yes	The end Status (Complete or Void) that the Task is to be updated with.

#### 2.5.4 Page Location

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

#### 2.5.5 Security Updates

N/A

#### 2.5.6 Page Mapping

N/A

#### 2.5.7 Accessibility

N/A

#### 2.5.8 Page Usage/Data Volume Impacts

N/A

### 2.6 Task Upload Detail Page – Task Closure Upload - Status New

#### 2.6.1 Overview

This section outlines modifications to the Task Upload Detail page to allow a user to create a new Task Closure Upload or View/Edit Task Closure Uploads.

## 2.6.2 Task Upload Detail Page – Task Closure Upload - Status New Mockup

### Task Upload Detail

\* - Indicates required fields

Save And Generate PreviewSave and ReturnCancel

#### Task Upload Information

<b>Name: *</b> Task Closure Template	<b>Status:</b> New
<b>Template Type: *</b> Closure	<b>File Name:</b> Closure Template.xlsx Remove
<b>Created By:</b> Vallari Bathala	<b>Updated On:</b> 11/22/2023
<b>Notes:</b> <div></div>	

Save And Generate PreviewSave and ReturnCancel

Figure 2.6.2-1 – Task Upload Detail Page – Closure Template - Create Mode

### Task Upload Detail

\* - Indicates required fields

EditClose

#### Task Upload Information

<b>Name: *</b> Task Closure Template	<b>Status:</b> New
<b>Template Type: *</b> Closure	<b>File Name:</b> Closure Template.xlsx
<b>Created By:</b> Vallari Bathala	<b>Updated On:</b> 12/05/2023
<b>Notes:</b> Task Closure for November.	

EditClose

This Type 1 page took 0.33 seconds to load.

Figure 2.6.2-2 – Task Upload Detail Page – Closure Template – View Mode

Task Upload Detail

\* - Indicates required fields

Save and ReturnCancel

Task Upload Information

Name: \*

Task Closure Template

Status:

New

Template Type: \*

Closure

File Name:

Closure Template.xlsx

Created By:

Vallari Bathala

Updated On:

11/30/2023

Notes:

Task Closure for November.

Save and ReturnCancel

This Type 1 page took 0.58 seconds to load.

Figure 2.6.2-3 – Task Upload Detail Page – Closure Template – Edit Mode

## 2.6.3 Description of Changes

### Task Upload Information

1. Template Type – Add the “Closure” template to the dropdown menu.

## 2.6.4 Page Location

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

## 2.6.5 Security Updates

N/A

## 2.6.6 Page Mapping

N/A

## 2.6.7 Accessibility

N/A

## 2.6.8 Page Usage/Data Volume Impacts

N/A

## 2.7 Task Upload Detail Page – Task Closure Upload – Preview Processing

### 2.7.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload of the “Closure” template is “Preview Processing”.

### 2.7.2 Task Upload Detail Page – Task Closure Upload – Preview Processing Mockup

Task Upload Information	
<b>Name: *</b> Task Closure Template	<b>Status:</b> Preview Processing
<b>Template Type: *</b> Closure	<b>File Name:</b> Closure Template.xlsx
<b>Created By:</b> Vallari Bathala	<b>Updated On:</b> 12/05/2023
<b>Notes:</b> Task Closure for November.	

Figure 2.7.2 – Task Upload Detail Page – Closure Preview Processing - View Mode

### 2.7.3 Description of Changes

The Status of “Preview Processing” indicates that the “Generate Preview” or “Save and Generate Preview” button was selected when the Status was “New” to run initial preview processing on the Closure file uploaded for the Task Upload. The page is only available in View mode when the Task Upload is in this Status.

### 2.7.4 Page Location

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

### 2.7.5 Security Updates

N/A

### 2.7.6 Page Mapping

N/A

### 2.7.7 Accessibility

N/A

### 2.7.8 Page Usage/Data Volume Impacts

N/A

## 2.8 Task Upload Detail Page – Task Closure Upload – Preview Complete

### 2.8.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload with a Template Type of "Closure" is "Preview Complete".

### 2.8.2 Task Upload Detail Page – Task Closure Upload – Preview Complete Mockup

**Task Upload Detail**

\*- Indicates required fields

EditClose

**Task Upload Information**

**Name: \***  
Task Closure Template

**Status:**  
Preview Complete

**Template Type: \***  
Closure

**File Name:**  
Closure Template.xlsx

**Created By:**  
Vallari Bathala

**Updated On:**  
12/05/2023

**Notes:**

**▼ Preview Information**

Value	Number of Tasks
Tasks without Errors	1
Tasks with Errors	<u>1</u>
Total Tasks	2

ApproveReject

EditClose

Figure 2.8.2 – Task Upload Detail Page – Closure Preview Complete – View Mode

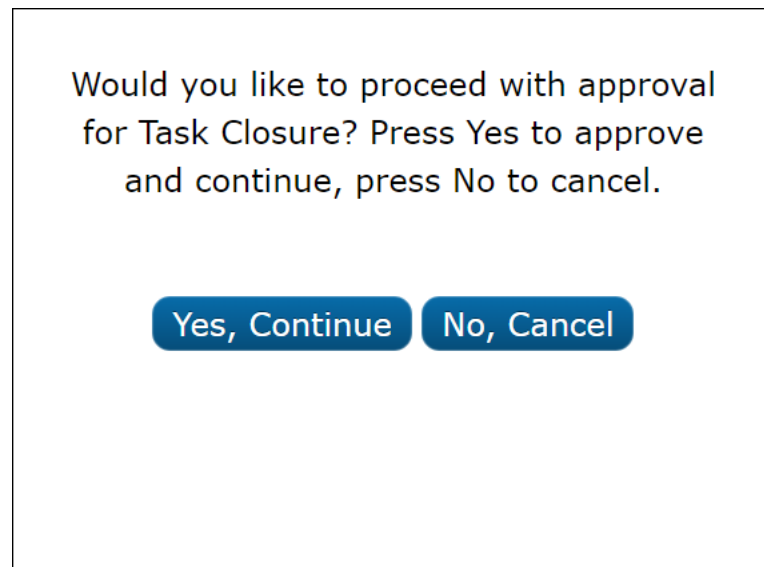
### 2.8.3 Description of Changes

The Status of "Preview Complete" indicates that the Task Upload has proceeded through the Preview Processing step (See [Section 2.7](#)) and completed the preview logic. At this point, the page will display additional information for the outcome of the preview processing.

1. Task Upload Information: Refer to [Section 2.6.3](#) for specifics.
2. Preview Information

"Tasks without Errors" will indicate a "Number of Tasks" value with the number of rows within the uploaded template that did not produce an error as part of the preview processing. Similarly, "Tasks with Errors" will indicate a "Number of Tasks" value greater than 0 if one or more rows within the uploaded template identify an error as part of the preview processing (see section 2.11).

- a. **BUTTON:** Approve – Update this button for closure processing such that once it is clicked, a message displays as an overlay confirming that the user wants to proceed with Task closure. This button is only available when the page is in View mode. The message within this overlay is "Would you like to proceed with approval for Task Closure? Press Yes to approve and continue, press No to cancel."



Pressing "Yes, Continue" will set the Task Upload status to "Approved – Tasks Processing". Refer to [Section 2.12](#) for Approval Processing specifics.

Pressing "No, Cancel" will close the overlay and leave the Task Upload status in "Preview Complete".

- b. The “Tasks without Errors” value will display as static text and will not be a hyperlink for Task Uploads with a ‘Template Type’ of “Closure”.

#### 2.8.4 Page Location

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

#### 2.8.5 Security Updates

N/A

#### 2.8.6 Page Mapping

N/A

#### 2.8.7 Accessibility

N/A

#### 2.8.8 Page Usage/Data Volume Impacts

N/A

### 2.9 Task Upload Detail Page – Task Closure Upload – Upload Complete

#### 2.9.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload with a Template Type of “Closure” is “Upload Complete”.

## 2.9.2 Task Upload Detail Page – Task Closure Upload – Upload Complete Mockup

**Task Upload Detail**

\*- Indicates required fields

VoidClose

**Task Upload Information**

**Name: \***  
Task Closure Template

**Status:**  
Upload Complete

**Template Type: \***  
Closure

**File Name:**  
Closure Template.xlsx

**Created By:**  
Vallari Bathala

**Updated On:**  
11/22/2023

**Notes:**

**Preview Information**

Upload approved on 11/22/2023 12:46:28 PM by Vallari Bathala (90AS002H6Q)

Value	Number of Tasks
Tasks without Errors	1
Tasks with Errors	<a href="#">1</a>
Total Tasks	2

**Upload Information**

Upload completed on 11/22/2023 12:46:29 PM

Value	Number of Tasks
Tasks without Errors	1
Tasks with Errors	0
Total Tasks	1

VoidClose

Figure 2.9.2 – Task Upload Detail Page – Closure Upload Complete

## 2.9.3 Description of Changes

The Status of "Upload Complete" indicates that Task closure processing has completed. At this stage, the page is only available in View mode.

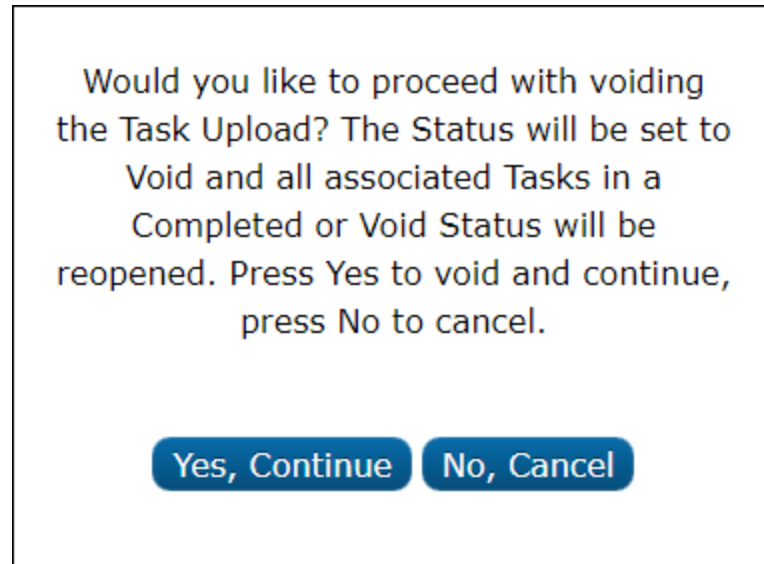
### 1. Task Upload Information:

a. The "Tasks without Errors" value will display as static text and will not be a hyperlink for Task Uploads with a 'Template Type' of "Closure".

b. Refer to [Section 2.6.3](#) for additional specifics.

### 2. Preview Information: Refer to [Section 2.8.3](#) for specifics.

3. **BUTTON:** Void – Update this button for Task Uploads with a Template Type value of "Closure such that once it is clicked, a message displays as an overlay confirming that the user wants to proceed with voiding the Task closure. This button is only available when the page is in View mode. The message within this overlay is "Would you like to proceed with voiding the Task Upload? The Status will be set to Void and all associated Tasks in a Completed or Void Status will be reopened. Press Yes to void and continue, press No to cancel."



Pressing "Yes, Continue" will void the Task Upload. Refer to [Section 2.13](#) for specifics.

Pressing "No, Cancel" will close the overlay and leave the Task Upload status in "Upload Complete".

#### 2.9.4 Page Location

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

#### 2.9.5 Security Updates

N/A

#### 2.9.6 Page Mapping

N/A

## 2.9.7 Accessibility

N/A

## 2.9.8 Page Usage/Data Volume Impacts

N/A

## 2.10 Preview Errors Page

### 2.10.1 Overview

This section will specifically describe the modification of this page when User clicks on the field: "Tasks with Errors" within the "Preview Information" panel.

### 2.10.2 Preview Errors Page Mockup

Preview Errors								
Close								
Name: Task Closure Template								
Summary								Results 1 - 1 of 1
Row	Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Complete/Void	Error Message
6	123456789	123456789					Complete	Invalid Case Number
Close								

**Figure 2.10.2 – Preview Errors Page**

### 2.10.3 Description of Changes

#### Summary

1. Update this section of the page to display the following columns for Task Uploads with a Template Type of "Closure":
  - a. Row – The row number that corresponds to the Row Number in the upload file that was processed for the Task Upload. This value serves as a reference to the original file to identify specific rows with the identified errors.
  - b. Task ID – The Task ID attribute for the row.
  - c. Case Number – The Case Number attribute for the row.
  - d. Task Type – The Task Type attribute for the row.
  - e. Task Sub-Type – The Task Sub-Type attribute for the row.
  - f. Due Date – The Due Date attribute for the row.
  - g. Complete/Void – The Complete/Void attribute for the row.

- h. Error Message – A comma-separated list of errors detected for the row during preview processing. Reference [Section 2.11](#) for specifics of preview processing.

#### 2.10.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

Click one of the hyperlinks or buttons available on the Task Upload List Page to access the Task Upload Detail page. Then, when the Status is Preview Complete or Upload Complete, click on the hyperlink next to the field "Tasks with Errors" within the Preview Information panel.

#### 2.10.5 Security Updates

N/A

#### 2.10.6 Page Mapping

Update Page Mapping with the new Task ID, Due Date and Complete/Void columns.

#### 2.10.7 Accessibility

N/A

#### 2.10.8 Page Usage/Data Volume Impacts

N/A

### 2.11 Preview Processing

#### 2.11.1 Overview

This section outlines modifications to the processing of a Task Closure Upload.

#### 2.11.2 Preview Processing

Once a Task Upload with Template Type of "Closure" is moved into the "Preview Processing" Status, the CalSAWS System will begin evaluating the information that has been uploaded via the template file. A series of evaluations will take place for each row within the file to confirm the validity of information for each row as defined, determine a preview of

the assignment distribution for those Tasks to be closed and indicate any warnings for invalid information that may require review.

Once this processing has been completed, the uploaded file will be removed from the CalSAWS file store as the information has been read from the file and stored into the database.

Preliminary Preview Processing/Error Evaluation:

Preview processing will attempt to access the uploaded file and specifically look for the existence of a worksheet titled "Tasks" and begin reading rows of data within this worksheet beginning with row #6, which is the first row for data entry beneath the column headers.

Data Validity Preview Processing/Error Evaluation:

The following table illustrates the evaluations that will take place for each attribute within the template. Leading and trailing blank spaces will be ignored, and upper/lower case does not matter.

Field	Validation	Error Message
Task ID	1. Confirm that the Task ID value is valid and that the Task ID is associated to a Task within the county.	Invalid Task ID
	2. If a valid Case Number value is provided, confirm that the Task ID is associated to the Case Number Provided.	Invalid Task ID for provided Case Number
	3. If the Task ID is valid for the county and the Task is NOT in an Assigned or In Process status.	Task is closed
Case Number	1. Confirm that the Case Number is valid for the County associated to the Task Upload.	Invalid Case Number
Program	N/A	N/A

Task Type	<p>If a Case Number value is NOT provided:</p> <p>1. Confirm that the Task Type is valid, exists for the County associated to the Task Upload AND that the Task Type is valid for the Task ID.</p>	Invalid Task Type
Task Sub-Type	<p>If a Case Number value is NOT provided:</p> <p>1. Confirm that the Task Sub-Type is associated to the Task Type identified in the Task Type column AND the Task Sub-Type is valid for the Task ID.</p>	Invalid Task Sub-Type
Due Date	<p>If a Case Number value is NOT provided:</p> <p>1. Confirm that the Due Date value is valid. Due Date entered must be in MM/DD/YYYY format.</p>	Invalid Due Date
	<p>If a Case Number value is NOT provided:</p> <p>2. Confirm that the Due Date value entered matches the Due Date for the associated Task.</p>	Invalid Due Date for the associated Task
Complete/Void	<p>1. Confirm the value is not null and is either "Completed" or "Void".</p>	Invalid Complete/Void status.

If a Case Number IS provided, the only fields that will process preview validations are:

- Task ID
- Case Number
- Complete/Void

If a Case Number is NOT provided, the following fields will be evaluated for preview validations:

- Task ID

- Task Type
- Task Sub-Type
- Due Date
- Complete/Void

## 2.12 Preview Approved/Upload Processing

### 2.12.1 Overview

This section outlines the processing once a preview is Approved.

### 2.12.2 Preview Processing

Once a Task Upload with Template Type of “Closure” is moved into the “Approved – Tasks Processing” Status, the CalSAWS System will update the following attributes for the valid Tasks:

- The Task Status will be set to “Completed”, or “Void” as specified in the Closure template.
- The Task History transaction will be logged to indicate the change in Status.
- The Completed/Void Date will be set.
- The Newly Assigned Indicator will be set to No.

## 2.13 Void Processing

### 2.13.1 Overview

This section outlines the processing if a completed Task Upload is Voided.

### 2.13.2 Preview Processing

Once a Task Upload with Template Type of “Closure” is moved into the “Void – Processing” Status, the CalSAWS System will update the following attributes:

- The Status for all Tasks closed by the Task Upload will be set to Assigned.
- The Task History transaction will be logged to indicate the change in Status.
- The Completed/Expiration/Void Date will be cleared out (Task History will preserve the previous closure event).





The Assign to Program Worker attribute will be re-evaluated and updated if necessary. The re-evaluation of the Assign to Program Worker attribute is necessary in the scenario where a Task may have been assigned to the Program Worker at the time of

expiration/void/complete, but the program worker may have since changed.

- iv. The Task Upload Status will be set to Void.

The above Void processing will not re-process a Task that has already been re-opened manually since the Task Upload closed the Task.

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Tasks	Task Upload – Closure Template	 Closure Template.xlsx
2	Tasks	Task Search/My Tasks	 Task Search Export.xlsx
3	Tasks	Task Reassignment Results	 Task Reassignment Results Export.xlsx
4	Tasks	QA/QC Task Sample Results	 Quality Task Sample Results Export.xlsx

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.5	<p>The LRS shall allow COUNTY-specified Users to access alerts, reminders, and controls by using the following criteria in order to initiate a search:</p> <ul style="list-style-type: none"><li>a. All alerts, reminders, and controls on a case or a file;</li><li>b. A specified due date or a range of due dates;</li><li>c. Type of alert, reminder, or control; and</li><li>d. Status of alert, reminder, or control.</li></ul>	<ul style="list-style-type: none"><li>1. Incorporate a "Closure" template to the Task Upload pages and processing framework that will allow counties to upload up to 10 thousand Tasks to be closed (Completed or Voided) in mass.</li><li>2. Modify Task Export templates and the Task Detail page to display a unique identifier (Task ID) for a Task to support the mass closure processing.</li></ul>

## 5 MIGRATION IMPACTS

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N/A.

## 6 OUTREACH

---

N/A.

## 7 APPENDIX

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N/A.



California Statewide Automated Welfare System

## **Design Document**

CA-265535

CFET Program Status Cleanup for Orange  
County

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/01/2023	1.0	Initial Draft	Connor O'Donnell
01/31/2023	1.1	Content Revision: -Updated Sections 1.3, 2.1.1, 2.1.2	Connor O'Donnell

## Table of Contents

1	Overview .....	4
	1.1 Current Design.....	4
	1.2 Requests.....	4
	1.3 Overview of Recommendations.....	4
	1.4 Assumptions .....	4
2	Recommendations.....	5
	2.1 Data Change – Deregister CFET Programs for Orange County .....	5
	2.1.1 Overview .....	5
	2.1.2 Description of Change.....	5
	2.1.3 Estimated Number of Records Impacted/Performance.....	6
3	Requirements.....	7
	3.1 Project Requirements.....	7
	3.2 Migration Requirements.....	<b>Error! Bookmark not defined.</b>
4	Outreach.....	8
	4.1 Lists.....	8

# 1 OVERVIEW

---

## 1.1 Current Design

The CFET program converted with an exempt CFET status in CalSAWS because these records existed in CalWIN. It is not a conversion issue since it pulled in the correct status. However, Orange County was not offering CFET services to customers prior to September 2023, so any CFET program block prior to 9/1/2023 should be deregistered with an end date of 8/31/2023, regardless if CalFresh is active or closed for all program blocks.

Orange County is requesting to leave all CFET program blocks if the begin date is 9/1/2023 or after.

Total Impact: Active: 20,945, Exempt: 28,635 = Total: 49,580

## 1.2 Requests

For Orange County, end-date CFET records and Deregister all CFET program blocks with End date of 08/31/2023 if the Begin date is prior to 9/1/2023

## 1.3 Overview of Recommendations

1. Deregister all CFET programs for Orange County ~~that have a~~ where the most recent open status has a Begin Date prior to 09/01/2023. The deregistered programs should be given an End Date of 08/31/2023 and a deregistered status that begins 09/01/2023.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

---

### 2.1 Data Change – Deregister CFET Programs for Orange County

#### 2.1.1 Overview

Orange County did not offer CFET prior to 09/01/2023. CalWIN records for Orange County were pulled into the system that had CFET records prior to this date, this change will deregisters all Orange County CFET programs that have a **most recent open status with a** Begin Date prior to 09/01/2023.

#### 2.1.2 Description of Change

1. ~~Deregister all CFET programs for Orange County that have a Begin Date prior to 09/01/2023. The deregistered programs should be given an End Date of 08/31/2023. Deregister all CFET programs for Orange County where the program does not have an open status(i.e. Active or Exempt) with a Begin Date on or after 09/01/2023. Do so by end-dating the status that is currently effective 08/31/2023 with an end date of 08/31/2023, removing all currently existing statuses after that status, and adding a deregistered status with a Begin Date of 09/01/2023. For programs that were closed on that date, or there is a more recent open status, no change is needed.~~

a. Here are some examples of the expected status before and after this DCR:

i. Example 1 (Program has no open status with a Begin Date on or after 09/01/2023, program is in a discontinued status on 08/31/2023, so the discontinued status is end-dated effective 08/31/2023 and a high-dated deregistered status is added with a begin date of 09/01/2023):

1. Before:

a. Active: 01/01/2023 – 08/25/2023

b. Discontinued: 08/26/2023 – High Date

2. After:

a. Active: 01/01/2023 – 08/25/2023

b. Discontinued: 08/26/2023 – 08/31/2023

c. Deregistered: 09/01/2023 – High Date

ii. Example 2 (Program has no open status with a Begin Date on or after 09/01/2023, program is in an active status on 08/31/2023, so the active status is end-dated effective 08/31/2023, the discontinued status is removed, and a high-dated deregistered status is added with a begin date of 09/01/2023):

1. Before:

- a. Active: 05/01/2023 – 09/25/2023
    - b. Discontinued: 09/26/2023 – High Date
  - 2. After:
    - a. Active: 01/01/2023 – 08/31/2023
    - b. Deregistered: 09/01/2023 – High Date
- iii. Example 3(Program has an open status with a begin date prior to 09/01/2023, but has a newer open status that began on or after 09/01/2023, so no change is needed):
  - 1. Before:
    - a. Active: 05/01/2023 – 09/15/2023
    - b. Discontinued: 09/16/2023 – 09/28/2023
    - c. Active: 09/29/2023 – High Date
  - 2. After:
    - a. Active: 05/01/2023 – 09/15/2023
    - b. Discontinued: 09/16/2023 – 09/28/2023
    - c. Active: 09/29/2023 – High Date
- iv. Example 4(Program has its first status on or after 09/01/2023, so no change is needed):
  - 1. Before:
    - a. Active: 09/02/2023 – 09/15/2023
    - b. Discontinued: 09/16/2023 – 09/28/2023
    - c. Active: 09/29/2023 – High Date
  - 2. After:
    - a. Active: 09/02/2023 – 09/15/2023
    - b. Discontinued: 09/16/2023 – 09/28/2023
    - c. Active: 09/29/2023 – High Date

### 2.1.3 Estimated Number of Records Impacted/Performance

49,580

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-517	The LRS shall allow COUNTY-specified Users to record and track the applicant s/participant s actual needs, including immediate needs, emergency needs (domestic violence, expedited CalFresh services, supportive services, homeless, medical services), and crisis intervention needs separately. - Application Registration and Application Evaluation - 2.4.1.2	This DCR updates CFET programs to record the case's needs correctly.

## 4 OUTREACH

---

### 4.1 Lists

**List Name:** CA-265535 Records this Data Change was applied to.

**List Criteria:** All records mentioned in Section 2.1

**Standard Columns:**

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

**Additional Column(s):**

- Program
- Program Status
- Begin Date
- End Date

**Frequency:** One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2023>CA-265535

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-266893

Update NOA logic generation for Failure to  
Complete Redetermination

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vicente Romero
	Reviewed By	Tiffany Huckaby

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/23/2024	1.0	Initial Revision	Vicente Romero
3/36/2024	1.1	Content Revision	Rachael Quriindongo

## Table of Contents

1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
	Assumptions .....	4
2	Recommendations.....	5
2.1	Update Failed to Respond Notices (MAGI/MSP/Non-MAGI) .....	5
2.1.1	Overview .....	5
2.1.2	Form/NOA Verbiage .....	6
2.1.3	Form/NOA Variable Population .....	6
2.1.4	Form/NOA Generation Conditions.....	6
2.2	Update MAGI Static Footer Fragments .....	7
2.2.1	Overview .....	7
2.2.2	NOA Verbiage .....	8
2.2.3	NOA Variable Population .....	8

2.2.4	NOA Generation Conditions .....	8
2.3	Update MAGI Over Income NOA.....	9
2.3.1	Overview .....	9
2.3.2	Form/NOA Verbiage .....	10
2.3.3	Form/NOA Variable Population .....	10
2.3.4	Form/NOA Generation Conditions.....	10
2.4	Automated Regression Test.....	10
2.4.1	Overview .....	10
2.4.2	Description of Changes .....	10

# 1 OVERVIEW

---

CalSAWS is currently not sending a Discontinuance Notice for Failed to Complete Redetermination in certain scenarios. This Effort will add a default notice to capture missed scenarios and fix existing notices. Along with adjusting verbiage on the MAGI static footer.

## 1.1 Current Design

CalSAWS is currently sending a generic notice to cover for cases that have not been sent a Failed to Complete Redetermination Discontinuance Notice. Failed to Respond Notice does not trigger when eligibility is ran more than a month after RE Due Month. MAGI static footer is currently triggered on all MAGI notices.

## 1.2 Requests

Update the Failed to Respond Notice to trigger when Eligibility is ran more than a month after the RE DUE month. Additionally, trigger this notice for a default scenario to ensure participants get Failed to Complete Redetermination discontinuance notice if all other notices fail to trigger.

Toggle Footer verbiage off when notice type is of Discontinuance or Denial.

## 1.3 Overview of Recommendations

1. Update Failed To Respond Notice to generate for more scenarios.
2. Toggle Footer verbiage off when notice type is of Discontinuance or Denial.

## Assumptions

1. Aside from Failed to Respond Notices, all other medical notices will not be updated.
2. Threshold Notices will not be added with this SCR.
3. Non-MAGI static footer does not trigger for denial and discontinuance notice; therefore, no adjustments are required for that fragment.

## 2 RECOMMENDATIONS

---

### 2.1 Update Failed to Respond Notices (MAGI/MSP/Non-MAGI)

#### 2.1.1 Overview

Update (MAGI/MSP/Non-MAGI) Failed to Respond Notice logic to trigger when edbc is ran past RE Due Month.

#### MAGI

**Fragment Name and ID:** MAGI Failed to Respond (H\_TN\_FAIL\_TO\_RESPOND\_H427, Id: 7788)

**State Form/NOA:** From ACWDL 17-32

**NOA Template:** MAGI Template (H\_NOA\_TEMPLATE (ID: 3033))

**Program(s):** Medi-Cal (MAGI/Mixed)

**Action Type(s):** Discontinuance

**Fragment Level:** Person

**Repeatable:** N

**Include NA Back 9:** Y - NA\_BACK\_9\_MAGI\_FRAGMENT (ID: 672)

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

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

#### MSP

**State Form/NOA:** Q\_TN\_FAILED\_TO\_RESPOND\_Q427 (Id: 9600)

*Technical Note: MSP reuses MC\_TN\_FAIL\_TO\_RESPOND\_M427 XDP, but has a different snippet to allow it to trigger with the MSP Template.*

**NOA Template:** Q\_NOA\_TEMPLATE (ID: 3158)

**Program(s):** Medi-Cal (MSP)

**Action Type(s):** Discontinuance

**Fragment Level:** Person

**Repeatable:** N

**Include NA Back 9:** Y - NA\_BACK9\_FRAGMENT (ID: 670)

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

**Languages:** English

#### Non-MAGI

**Fragment Name and ID:** Non-MAGI Failed to Respond  
(MC\_TN\_FAIL\_TO\_RESPOND\_M427, Id: 7787)

**State Form/NOA:** From ACWDL 17-32

**NOA Template:** MC\_NOA\_TEMPLATE (ID: 3028)

**Program(s):** Medi-Cal (Non-MAGI/Mixed)

**Action Type(s):** Discontinuance

**Fragment Level:** Program

**Repeatable:** N

**Include NA Back 9:** Y - NA\_BACK9\_FRAGMENT (ID: 670)

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

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

### 2.1.2 Form/NOA Verbiage

No verbiage will be modified.

### 2.1.3 Form/NOA Variable Population

No Variable Population will be modified.

### 2.1.4 Form/NOA Generation Conditions

#### 1. Add Fragment Generation

Failed to Respond Notice should trigger during a "Late" (a month or more after the RE Due month) RE Run.

Example:

Medical RE Due Month is 07/2023. Worker ran Eligibility for benefit month 02/2024 and program was discontinued for Failed to Complete Redetermination.

Although Eligibility was not run for 08/2023, Discontinuance Notice should trigger for benefit month 02/2024 with the effective date and appropriate 90 day verbiage starting from the begin month of 02/2024.

**Additionally,** Failed to Respond notice will trigger for a secondary scenario.

(MAGI) Failed to Respond Secondary trigger:

- 1) Medical Program Person was previously active
  - 2) Previously was receiving a MAGI Aid code, and is currently discontinued for Failed to Complete Redetermination.
  - 3) This notice should only trigger if there were no other Failed To Complete Redetermination Notices that triggered for this eligibility run.
- Technical Note: There are several MAGI notices that generate due to having a status reason of Failed to Complete Redetermination. This notice should be last in priority to trigger.*

(MSP) Failed to Respond Secondary trigger:

- 1) Medical Program Person was previously active
  - 2) Previously was receiving a MSP Aid code, and is currently discontinued for Failed to Complete Redetermination.
  - 3) This notice should only trigger if there were no other Failed To Complete Redetermination Notices that triggered for this eligibility run.
- Technical Note: There are several MSP notices that generate due to having a status reason of Failed to Complete Redetermination. This notice should be last in priority to trigger.*

(Non-MAGI) Failed to Respond Secondary trigger:

- 1) Medical Program Person was previously active
  - 2) Previously was receiving a Non-MAGI Aid code, and is currently discontinued for Failed to Complete Redetermination.
  - 3) This notice should only trigger if there were no other Failed To Complete Redetermination Notices that triggered for this eligibility run.
- Technical Note: There are several Non-MAGI notices that generate due to having a status reason of Failed to Complete Redetermination. This notice should be last in priority to trigger.*

## 2.2 Update MAGI Static Footer Fragments

### 2.2.1 Overview

Static Footer Fragments currently generate for MAGI Notices. Static Footer should be updated to toggle off "10 - day reporting" verbiage when the notice is discontinuance or denial action type.

**Fragment Name and ID:** H\_STATIC\_FOOTER (Id: 5083)

**Current Program(s):** (MAGI) Medical

**Current Action Type:** (Approval, Change, Denial, Discontinuance)

**Currently Repeatable:** N

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

### 2.2.2 NOA Verbiage

No verbiage will be modified.

### 2.2.3 NOA Variable Population

No Variable Population will be modified.

### 2.2.4 NOA Generation Conditions

Fragment Text	Population
---------------	------------

<p><b>Do you have any changes?</b> Over the next year, you are obligated to report any changes that would affect your health insurance within 10 days of such a change. You are obligated to contact us if:</p> <ul style="list-style-type: none"> <li>• You move.</li> <li>• Your income changes; or</li> <li>• Your household changes, for example, you marry/divorce, become pregnant, or have a child(ren)</li> <li>• You become qualified for other health insurance</li> </ul> <p>To report changes, please contact your county office using one of the following ways:</p> <ul style="list-style-type: none"> <li>• Telephone:</li> <li>• In person:</li> <li>• Fax:</li> <li>• Office Hours:</li> </ul> <p>To report changes, please contact your county office using one of the following ways:</p> <ul style="list-style-type: none"> <li>• County Worker:</li> <li>• County Worker ID:</li> </ul> <p><b>If you already have a Benefits Identification Card (BIC), do not throw it away.</b> You should keep using that card. If you have never received a BIC, one will be mailed to you soon. If you previously received a BIC but no longer have that BIC, contact your worker for a replacement. The BIC has the information your provider needs to check your Medi-Cal eligibility. You should bring the BIC to your medical provider whenever you need care.</p> <p><b>Questions?</b> If you have questions or need assistance please contact</p> <p><small>This notice is required by the Affordable Care Act per regulation 42 C.F.R. § 431.206 and Cal. Code Regs., tit. 22, § 50179</small></p>		<p>Text within the highlighted box should be hidden when the action type of the notice is discontinuance or denial.</p>
---	--	---

## 2.3 Update MAGI Over Income NOA

### 2.3.1 Overview

Update MAGI Over Income NOA to be suppressed when at least one of the notices listed in 2.3.4 is generated.

**Fragment Name and ID:** MAGI Over Income (H\_TN\_OVER\_MAGI\_INCOME\_H113 , Id: 7067)

**State Form/NOA:** From ACWDL 17-32

**NOA Template:** MAGI Template (H\_NOA\_TEMPLATE (ID: 3033))

**Program(s):** Medi-Cal (MAGI/Mixed)

**Action Type(s):** Discontinuance

**Fragment Level:** Person

**Repeatable:** Y

**Include NA Back 9:** Y - NA\_BACK\_9\_MAGI\_FRAGMENT (ID: 672)

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

**Languages:** Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Spanish, Tagalog, Vietnamese, English

### 2.3.2 Form/NOA Verbiage

No verbiage will be modified.

### 2.3.3 Form/NOA Variable Population

No Variable Population will be modified.

### 2.3.4 Form/NOA Generation Conditions

#### 1. Add Fragment Generation

MAGI Over Income notice will be suppressed when at least one of following notices generate for the same benefit month:

1) H\_TN\_FAIL\_REDETERM\_VERIF\_H401 (Id: 6894)

2) H\_TN\_FAIL\_REDETERM\_RESPONSE\_H400 (Id: 6893)

3) H\_TN\_MC355\_VERIF\_NOT\_RECEIVED\_H425 (Id: 7609)

4) H\_TN\_FAIL\_TO\_RESPOND\_H427 (Id: 7788)

*Note: This should also include newly created trigger in recommendation 2.1.4 for MAGI Failed to Respond Default Notice.*

## 2.4 Automated Regression Test

### 2.4.1 Overview

Create new automated regression test scripts to verify that the Medi-Cal program is Discontinued and a Non-MAGI Failed to Respond NOA is generated when EDBC is run for an ongoing, Non-MAGI Medi-Cal program with an outstanding RE Packet in a month after the RE Due Month.

### 2.4.2 Description of Changes

1. Create a regression script to verify that the Medi-Cal program is Discontinued and a Failed to Respond NOA is generated when Negative Action EDBC is run with reason 'Failed to Complete Redetermination' for the following case scenario:

- a. Medi-Cal is Active in the previous benefit month with a Non-MAGI aid code.
  - b. An RE Packet in 'Sent' status exists for the previous RE period.
  - c. EDBC is being run for a single month only.
  - d. The EDBC benefit month is one month after the RE Due Month.
- 2. Create a regression script to verify that the Medi-Cal program is Discontinued and a Failed to Respond NOA is generated when Negative Action EDBC is run with reason 'Failed to Complete Redetermination' for the following case scenario:
  - a. Medi-Cal is Active in the previous benefit month with a Non-MAGI aid code.
  - b. An RE Packet in 'Sent' status exists for the previous RE period.
  - c. EDBC is being run for a single month only.
  - d. The EDBC benefit month is three months after the RE Due Month.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-267549

GAGR AS - Update to Placer's NOA 102-3

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Soundarya Ramesh
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/05/2024	1.0	Original Draft	Soundarya Ramesh
03/19/2024	1.0	Content revision to calculate the dates based on edbc aidBeginDate	Soundarya Ramesh

## Table of Contents

1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions .....	4
2	Recommendations.....	5
2.1	Add two new Variables to send the appropriate begin date and end date when the application date is a partial month.....	5
2.1.1	Overview .....	5
2.1.2	Description of Change.....	5
2.1.2	1.1.1 Execution Frequency .....	6
2.1.3	1.1.2 Key Scheduling Dependencies.....	6
2.1.4	1.1.3 Counties Impacted .....	6
2.1.5	1.1.4 Data Volume/Performance .....	6
2.1.6	1.1.5 Interface Partner .....	6
2.1.7	1.1.6 Failure Procedure/Operational Instructions .....	6
2.2	Add a new variable to send the hearing time details in json.....	7
2.2.1	Overview .....	7
2.2.2	Description of Change.....	7
2.2.2	1.1.1 Execution Frequency .....	7
2.2.3	1.1.2 Key Scheduling Dependencies.....	7
2.2.4	1.1.3 Counties Impacted .....	8
2.2.5	1.1.4 Data Volume/Performance .....	8
2.2.6	1.1.5 Interface Partner .....	8
2.2.7	1.1.6 Failure Procedure/Operational Instructions .....	8
3	Supporting Documents .....	8

# 1 OVERVIEW

---

This SCR will update the Employability 3-month limit on the GR Employable NOA 102-3 of Placer County.

## 1.1 Current Design

1. Currently in CalSAWS, the GR Employable NOA 102-3 for XAF346 reason code for Placer County considers the application month to calculate the employability limit of 3 months even when the application date is a partial month.
2. Currently in CalSAWS, the Hearing time is not being populated in the json and hence is not sent in CSF 43(Scheduled Hearing) and CSF 42(Hearing reschedule notification) NOAs.

## 1.2 Requests

1. If the aid begin date is a partial month, it does not count toward the 3-month employable limit.

Add two new Variables to send the appropriate begin date and end date when the aid begin date is a partial month.

2. Add a new variable to send the hearing time in the json.

## 1.3 Overview of Recommendations

1. Add two new Variables to send the begin date and end date when the application date is a partial month.
2. Add a new variable to send the hearing time to be populated in CSF 43(Scheduled Hearing) and CSF 42(Hearing reschedule notification) in the json.

## 1.4 Assumptions

1. AidBeginDate will not be changed in the GenerateDocumentRequest.

## 2 RECOMMENDATIONS

---

### 2.1 Add two new Variables to send the appropriate begin date and end date when the application date is a partial month.

#### 2.1.1 Overview

1. periodBeginDateForMonthClock field will be:
  - a. the 1<sup>st</sup> day of the current month if aidBeginDate falls on 1<sup>st</sup> day of the current month.

Example: If Aid starts from 04/01/2023, then the periodBeginDateForMonthClock will be 04/01/2023.

- b. The 1<sup>st</sup> day of the following month if aidBeginDate falls on any other date other than the first of the month.

Example: If Aid starts from 04/02/2023, then the periodBeginDateForMonthClock will be 05/01/2023.

2. periodEndDateForMonthClock field will be the last day of the 3<sup>rd</sup> month from the periodBeginDateForMonthClock date.

#### 2.1.2 Description of Change

When the application date is a partial month, two new variables periodBeginDateForMonthClock and periodEndDateForMonthClock will be sent in the GenerateDocumentRequest.

Response field	Type	Required	Description
periodBeginDateForMonthClock	TimeStamp	Yes	The 1st day of the next month of the aidBeginDate if aidBeginDate is a partial month OR 1st day of the current month if aidBeginDate is not a partial month. Derived from EDBC_PERS.AID_BEGIN_DATE/AG_ELIG_RSN
periodEndDateForMonthClock	TimeStamp	Yes	The last day of the 3 <sup>rd</sup> month from the periodBeginDateForMonthClock date.

### **2.1.2 1.1.1 Execution Frequency**

The Generate Document Web Service is invoked in four different ways:

- After EDBC processing (Online or Batch), a "Document Request" is invoked to generate the required documents. Also, non-EDBC form generation requests that are triggered are considered "Document Request".
- Once the GA/GR Correspondence Service is finished with their processing after the initial CalSAWS Generate Document request, a request can be sent back to the CalSAWS system where there is no PDF returned because of missing mandatory variables. In this case, a worker will send a "Update/Append Request" to fill out the missing variables.
- A worker can request to update a document that has been previously generated through the GA/GR Correspondence Service through an "Update/Append Request".
- A worker can request to generate a document through the CalSAWS application's Template Repository through a "Manual Correspondence Request".

### **2.1.3 1.1.2 Key Scheduling Dependencies**

N/A

### **2.1.4 1.1.3 Counties Impacted**

GA/GR Automated EDBC/CC Counties (Current 18 CalWIN counties)

### **2.1.5 1.1.4 Data Volume/Performance**

N/A

### **2.1.6 1.1.5 Interface Partner**

GA/GR Correspondence Service (Hosted by Gainwell)

### **2.1.7 1.1.6 Failure Procedure/Operational Instructions**

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

## 2.2 Add a new variable to send the hearing time details in json.

### 2.2.1 Overview

Add a new variable to send the hearing time to be populated in CSF 43(Scheduled Hearing) and CSF 42(Hearing reschedule notification) in the json.

### 2.1.2 Description of Change

Add a new variable to send the hearing time to be populated in CSF 43(Scheduled Hearing) and CSF 42(Hearing reschedule notification) in the json.

Response field	Type	Required	Description
hearingTime	String	No	(HEAR_SUMM.HEAR_TIME/HR_SCHD.BGN_DTM) This is the time of the scheduled hearing.

### 2.2.2 1.1.1 Execution Frequency

The Generate Document Web Service is invoked in four different ways:

- After EDBC processing (Online or Batch), a "Document Request" is invoked to generate the required documents. Also, non-EDBC form generation requests that are triggered are considered "Document Request".
- Once the GA/GR Correspondence Service is finished with their processing after the initial CalSAWS Generate Document request, a request can be sent back to the CalSAWS system where there is no PDF returned because of missing mandatory variables. In this case, a worker will send a "Update/Append Request" to fill out the missing variables.
- A worker can request to update a document that has been previously generated through the GA/GR Correspondence Service through an "Update/Append Request".
- A worker can request to generate a document through the CalSAWS application's Template Repository through a "Manual Correspondence Request".

### 2.2.3 1.1.2 Key Scheduling Dependencies

N/A

#### **2.2.4 1.1.3 Counties Impacted**

GA/GR Automated EDBC/CC Counties (Current 18 CalWIN counties)

#### **2.2.5 1.1.4 Data Volume/Performance**

N/A

#### **2.2.6 1.1.5 Interface Partner**

GA/GR Correspondence Service (Hosted by Gainwell)

#### **2.2.7 1.1.6 Failure Procedure/Operational Instructions**

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

### **3 SUPPORTING DOCUMENTS**

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N/A

