

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222130

Lobby Device: Change wording on Kiosk Screen

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06.13.2024	1.0	Initial	Kusnadi.E

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1 OVERVIEW

1.1 Current Design

Currently, before completing the check-in process for both the Lobby Kiosk and Lobby Tablet (with Kiosk flow) there's a screen (there's different version of this screen based on the selected flow that asks the same question) that gets displayed asking user the question 'Is there anything else I can help you with....?' and they can choose the option of Yes or No. Selecting the option of 'Yes' will take the user back to the main screen that will allow them to start a new check-in process. Selecting the option of 'No' will complete the check-in process.

1.2 Requests

Update both the Lobby Kiosk and Lobby Tablet (with Kiosk flow) to only display one version of the 'Is there anything else I can help you with.....?' screen along with updating the wording on the question and relabeling the 'Yes' and 'No' button.

1.3 Overview of Recommendations

1. Update both the Lobby Kiosk and Lobby Tablet (with Kiosk flow) to only display one 'Is there anything else I can help you with.....?' screen.
 - a. The screen will be updated to change the question from 'Is there anything else I can help you with.....?' to 'Can I help you with anything else?'
2. The screen will be updated to relabel the 'Yes' button to 'Yes, Return to Main Menu' and 'No' to 'No, I'm Done'.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. SCR CA-273055 will be updating the Preview functionality on the CalSAWS application.

2 RECOMMENDATIONS

2.1 Is there anything else I can help you with....? Screen

2.1.1 Overview

Currently, before completing the check-in process for both the Lobby Kiosk and Lobby Tablet (with Kiosk flow) there's a screen (there's different version of this screen based on the selected flow that asks the same question) that gets displayed asking user the question from 'Is there anything else I can help you with.....?' and they can choose the option of Yes or No. Selecting the option of 'Yes' will take the user back to the main screen that will allow them to start a new check-in process. Selecting the option of 'No' will complete the check-in process. This SCR will update the Lobby Kiosk and Lobby Tablet (with Kiosk flow) to only display one version of the screen and in addition the screen will be updated to change the wording of the question along with relabeling the 'Yes' and 'No' button.

2.1.2 Can I help you with anything else today? Mockup

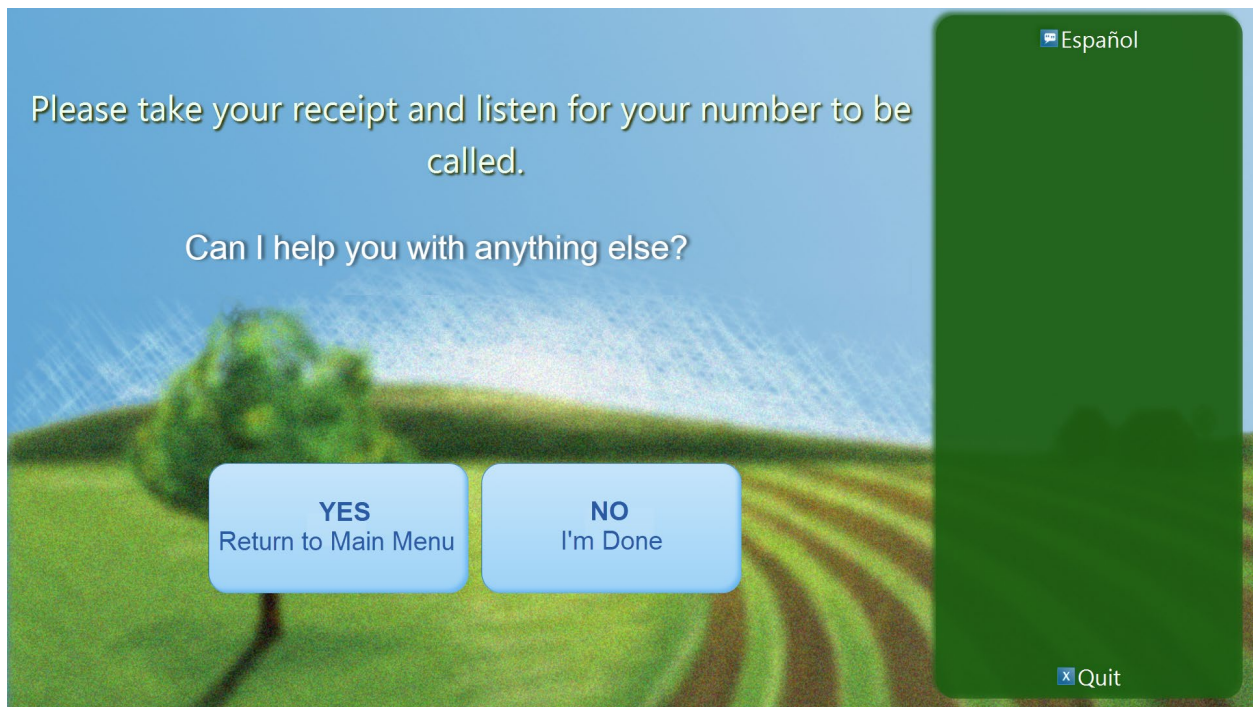


Figure 2.1.1 – Can I help you with anything else screen (English version)
(Note: The Please take your receipt.... is the On-Screen Instructions)



Figure 2.1.2 – Can I help you with anything else screen (Spanish version)

2.1.3 Description of Changes

1. Update the wording on the 'Is there anything else I can help you with...?' screen for both the Lobby Kiosk and Lobby Tablet (with Kiosk flow) Please reference Section 2.1.2 for mockups.
 - a. Update the verbiage from 'Is there anything else I can help you with....?' to 'Can I help you with anything else?'.
 - i. Spanish: '¿Le puedo ayudar con algo mas? '
 - b. Relabel the 'Yes' button to 'YES Return to Main Menu'.
 - i. 'YES' will be bolded.
 - ii. Spanish: 'Sí volver al menú principal'.
 1. 'Sí' will be bolded
 - c. Relabel the 'No' button to 'NO I'm Done'.
 - i. 'NO' will be bolded
 - ii. Spanish: 'No ya he terminado'.
 1. 'No' will be bolded

Note: For Kiosk Flow that have the option to enter the On-Screen Instructions (on the Action Detail page in CalSAWS) the On-Screen Instructions will continue to display at the top of the screen. On Figure 2.1.1 this is the 'Please take your receipt....'

2. Update Lobby Kiosk and Lobby Tablet to only display the 'Can I help you with anything else?' screen regardless of Kiosk flow that is selected (Case Validated flow, Non-Case Validated flow, and Document only).

Examples:

For Case validated flow, the screen will no longer display: 'Is there anything else I can help you with on case XXX?'

For Non-Case Validated flow, the screen will no longer display: 'Is there anything else I can help you with today?'

For Document only flow, the screen will no longer display: 'Please take your original documents. Is there anything else I can help you with on case XXX?'

2.1.4 Page Location

- Lobby Kiosk/Lobby Tablet

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.1.2	The LRS shall provide a method to log and record individual contact and inquiries.	The existing is the anything else I can help you with is updated to only have 1 version of the screen and the wording on the screen along with the two buttons are updated as well to prevent confusion.



California Statewide Automated Welfare System

Design Document

CA-262186

Santa Clara – RPA

Worker ID Assignment

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Pavithra /Korey Edwards
	Reviewed By	Sri G Ghanshyamlal

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
16/07/2024	1.0	Initial Draft	Pavithra

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1 DOCUMENT CONTROL

1.1 Version Control

This is a version-controlled document. Please ensure that you have the latest copy. Draft versions are numbered 0.x. Approved version use major x.0 numbering.

1.2 Change Control

This document is subject to change control. Any modifications, amendments or omissions are subject to review and tracking control until a final release can be issued. Tracking and change management is done by the document owner. Any changes made after a final version (read: not a draft version), should be agreed upon by all parties involved in the initiative.

Date	Author	Version	Change reference/Description
07/16/2024	Pavithra	0.1	Original SDD draft

1.3 Approval

Name	Organization	Title	Sign Off Date
Sri G Ghanshyamlal	Accenture	Delivery Lead	

2 PROCESS DETAILS

2.1 System Perspective

The RPA portion of the worker Assignment BOT consists of three sub processes.

- a. Retrieve and queue the [XLS/CSV] file received on daily basis (Single /Multiple)
- b. Process the transaction data in the CalSAWS application to reassign the worker ID
- c. Reporting for successful and unsuccessful transactions for every CSV/XLS file

Queues will be used to so that each worker assignment request is tracked for exceptions and prevents failing the entire batch of assignments.

2.2 Robotic Resource Requirement

The below table outlines the frequency of the automation

Automation	Frequency	Run Type	Run Time Kick Off
Queueing Process	Daily every other hour	Unattended	Every other hour 24/7
Assignment Process	Daily every other hour	Unattended	Every other hour 24/7
Reporting Process	Daily after every input file has been processed	Unattended	Every other hour 24/7

2.3 Overview

File Queuing Process - This process is responsible for monitoring the SFTP folder at a set interval and retrieving the [XLS/CSV] worker reassignment file to be processed. It will,

- Retrieve the [XLS/CSV] file.
- Validate the file has the expected data fields for successful processing.
- Parse the [XLS/CSV] file and create queue items for each individual row to be stored in the Worker Assignment Queue. These details include:
 - Case Id
 - Program (FS, CP, MC, CW, GR, RC, NB, HP, HT)
 - Worker Id
 - Program (No check and process regardless of the program status)
 - Print worker letter (Y/N)
- Sends an email notification if there is an issue with file such as Invalid file format, Invalid naming convention, Invalid Case Numbers.

Reassignment Process – This process is responsible for reassigning the programs to workers as designated by the program worker assignment file. It will:

- Retrieve work items from the Worker Assignment Queue.
- Reassign the program to the designated worker id in the CalSAWS application based on the program
- Create a queue item logging the success or failure of program assignment to be stored in the Worker Assignment Report Queue. These details include:
 - Status (Success/Failure)
 - Exception Reason
 - Case Id
 - Worker Id
 - Program (FS, CP, MC, CW, GR, RC, NB, HP, HT)

Reporting Process – The reporting process is responsible for creating and sending the status reports for each Worker Assignment file.

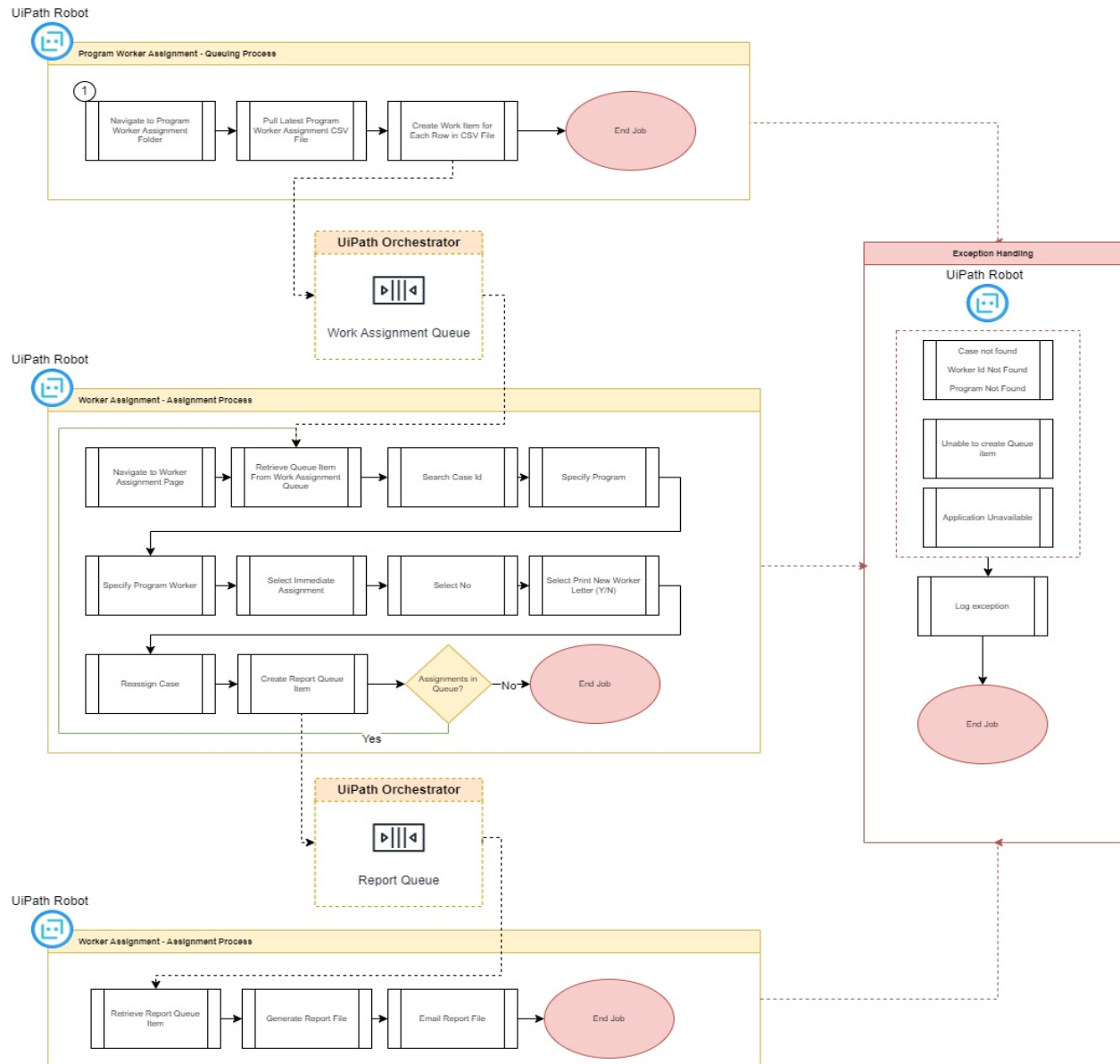
2.4 Scope

Scope details as outlined below:

- **In Scope:**
 - Program (FS, CP, MC, CW, GR, RC, NB, HP, HT)
 - Regardless of the program status the cases to be assigned to the designated worker id
- **Out of Scope:**
 -

3 SOLUTION DETAILS

3.1 Robot Process Flowchart



3.2 Input File format.

The input file will be received single / multiple times on daily basis. For every Case number there will be single pro assigned to the worker id.

File Naming Convention/Format:

workerassignment_mmddyyyy_hhmmss.csv/xlsx.

Input File format:

S NO	Case Number	Program	Worker Id	Print Worker Letter
1	7 Digit Alphanumeric	FS - CalFresh	10 Digit Alpha Numeric	Y/N
2		CP		
3		MC		
4		CW		
5		GR		
6		RC		
7		NB		
8		HP		
9		HT		

3.3 Application Details.

Application	Type	Access	Remarks
Outlook	Web Integration		To send out daily reports and technical/business exceptions
Excel	Web Integration		For reporting
CalSAWS Application	Web Integration		To process the data/transactions
SFTP	Web Integration		SFTP for input file transfer

3.4 Output Reports.

The bot will send out the reports daily after every input file is processed via email.

The report format will be .xlsx and will be attached to the email. Report will have three tabs as shown below

- a. Summary tab – Overview of all transactions processed successfully and exceptions

[illegible]

- b. Successful tab – Details of all the successful transactions report as shown below

	A	B	C	D	E
1	Case Number	Program	Worker ID	Status	
2				Successful	
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					
30					

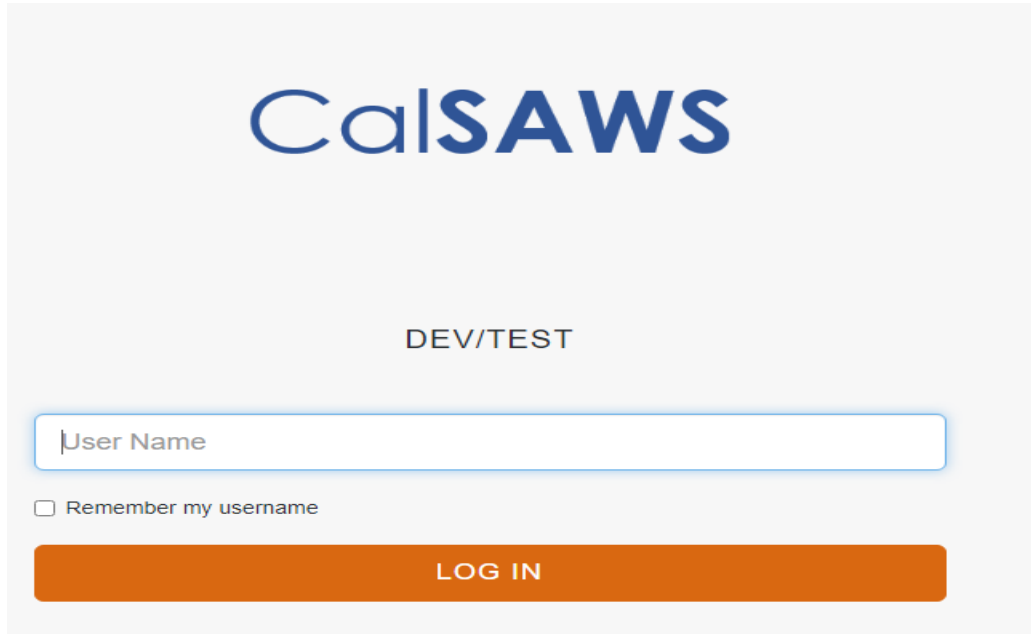
- c. Exceptions- Details of all the exceptions transactions report as shown below

[illegible]

4 CLICK LEVEL PROCESS STEPS

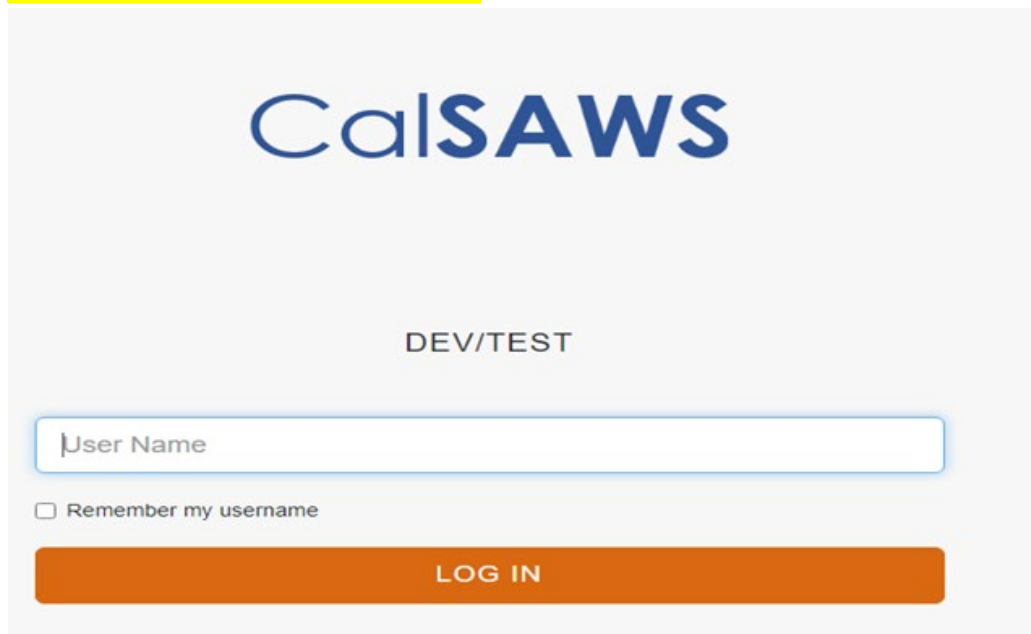
The RPA bot will perform following steps:

1. Access CalSAWS application - <https://cc1.calsaws.net/>

The image shows the CalSAWS login screen. At the top, the text "CalSAWS" is displayed in a large, blue, sans-serif font. Below it, the text "DEV/TEST" is centered in a smaller, black, sans-serif font. There is a white input field with a blue border and a blue shadow, containing the placeholder text "User Name". Below the input field, there is a checkbox with the label "Remember my username". At the bottom, there is a wide, orange button with the text "LOG IN" in white, uppercase letters.

CalSAWS Login Screen

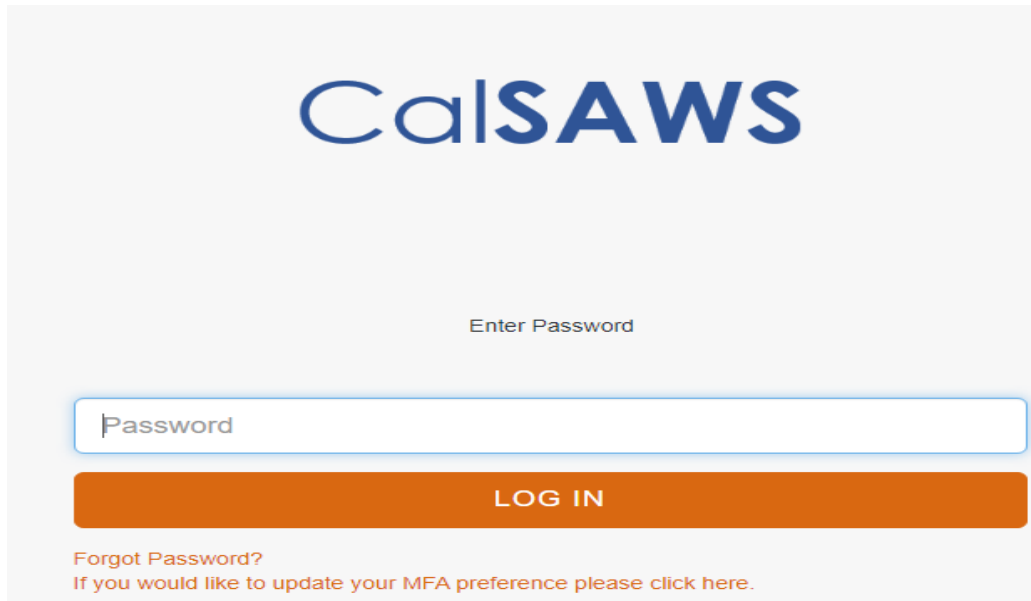
2. Enter the RPA Account username

This image is identical to the one above, showing the CalSAWS login screen. It features the "CalSAWS" logo, the "DEV/TEST" environment label, a "User Name" input field, a "Remember my username" checkbox, and an orange "LOG IN" button.

CalSAWS Username screen

3. Click the "Log In" button.

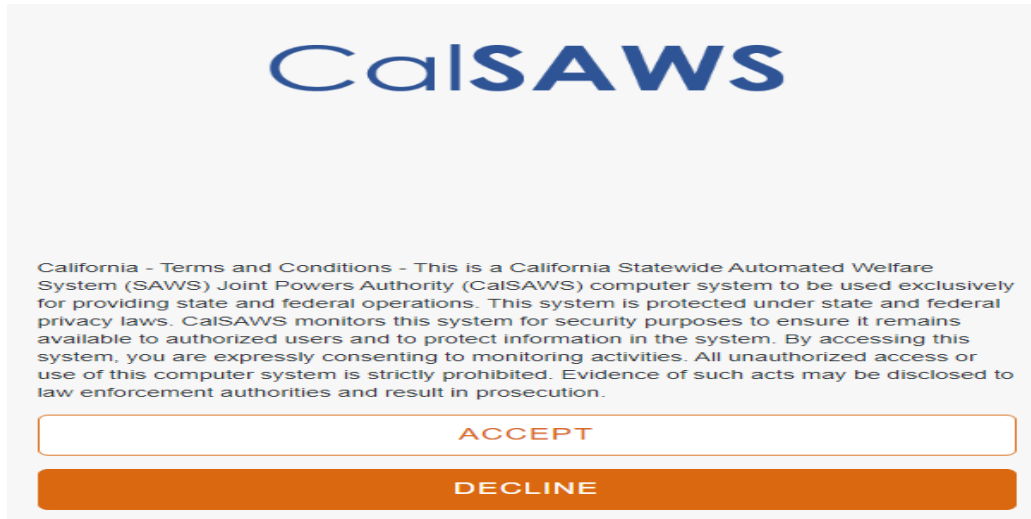
4. Enter the RPA Account Password.



The image shows the CalSAWS Password Screen. At the top is the CalSAWS logo in blue. Below the logo is the text "Enter Password". Underneath is a white password input field with a blue border and the placeholder text "Password". Below the input field is an orange button with the text "LOG IN" in white. At the bottom, there is a link in red text that says "Forgot Password? If you would like to update your MFA preference please click here."

CalSAWS Password Screen

5. Click the "Log In" button.
6. Click on the Accept button on the CalSAWS Security Screen as shown below.



The image shows the CalSAWS Security Screen. At the top is the CalSAWS logo in blue. Below the logo is a block of text in small font: "California - Terms and Conditions - This is a California Statewide Automated Welfare System (SAWS) Joint Powers Authority (CalSAWS) computer system to be used exclusively for providing state and federal operations. This system is protected under state and federal privacy laws. CalSAWS monitors this system for security purposes to ensure it remains available to authorized users and to protect information in the system. By accessing this system, you are expressly consenting to monitoring activities. All unauthorized access or use of this computer system is strictly prohibited. Evidence of such acts may be disclosed to law enforcement authorities and result in prosecution." Below the text are two buttons: a white button with an orange border labeled "ACCEPT" and an orange button labeled "DECLINE".

CalSAWS Security Screen

7. Click on County Field on the CalSAWS Home Page. Enter "43-Santa Clara" and hit Enter as shown below.

CalSAWS

Journal
Tasks
Help
Resources
Page Mapping
Imaging
Log Out

San Bernardino CCI

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Welcome, Pavithra Ananthapadmanabhan!

SAN BERNARDINO

Tuesday, July 16, 2024

Worker ID: 90AS00LH00

County:

43 - Santa Clara

Case Number:

Submit

Announcements

Type	Date
Release 24.05.02-Release Notes	CalSAWS
Release Note Report	CalSAWS

Quick Links

[Reception Log](#)
[Reminders](#)
[County Calendar](#)

My Tasks

My Schedule

My New Assignments

CalSAWS Home Page

- Confirm the CalSAWS Home page is pointing to Santa Clara County

CalSAWS

Journal
Tasks
Help
Resources
Page Mapping
Imaging
Log Out

Santa Clara CCI

Case Info

Eligibility

Empl. Services

Child Care

Resource Databank

Fiscal

Special Units

Reports

Client Corresp.

Admin Tools

Welcome, Pavithra Ananthapadmanabhan!

SANTA CLARA

Tuesday, July 16, 2024

Worker ID: 90AS00LH00

County:

43 - Santa Clara

Case Number:

Submit

Announcements

Type	Date
Release 24.05.02-Release Notes	CalSAWS
Release Note Report	CalSAWS

Quick Links

[Reception Log](#)
[Reminders](#)
[County Calendar](#)

My e-Messages

My Tasks

My Schedule

CalSAWS Home Page with Santa Clara County

9. Click Admin Tools from the Global selection Bar as highlighted below.

CalSAWS Journal Tasks Help Resources Page Mapping Imaging Log Out

Santa Clara CC1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. **Admin Tools**

Welcome, Pavithra Ananthapadmanabhan! SANTA CLARA Tu

Worker ID: 90AS00LH00 County: 43 - Santa Clara Case Number: Submit

Announcements	Type	Date
Release 24.05.02-Release Notes	CalSAWS	
Release Note Report	CalSAWS	

Quick Links

- Reception Log
- Reminders
- County Calendar

My e-Messages

My Tasks

My Schedule

Office Admin
Admin
Workload Assignment
Performance Analysis
Worker Schedule
Office Schedule
Customer Schedule
Manage Schedule Intake/Duty/Supervisor
Alerts

CalSAWS Home Page with Santa Clara County

10. Click "Workload Assignment" from the drop down as highlighted below

CalSAWS Journal Tasks Help Resources Page Mapping Imaging Log Out

Santa Clara CC1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. **Admin Tools**

Welcome, Pavithra Ananthapadmanabhan! SANTA CLARA Tu

Worker ID: 90AS00LH00 County: 43 - Santa Clara Case Number: Submit

Announcements	Type	Date
Release 24.05.02-Release Notes	CalSAWS	
Release Note Report	CalSAWS	

Quick Links

- Reception Log
- Reminders
- County Calendar

My e-Messages

My Tasks

My Schedule

Office Admin
Admin
Workload Assignment
Performance Analysis
Worker Schedule
Office Schedule
Customer Schedule
Manage Schedule Intake/Duty/Supervisor
Alerts

CalSAWS Home Page with Santa Clara County

11. Click Case Number check box from Workload Reassignment Detail page.

CalSAWS

Santa Clara CCI

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Workload Assignment

Workload Reassignment

Workload Reassignment Confirmation

Pending Workload Assignments

Individual Reassignment

Workload Reassignment Detail

* - Indicates required fields

Reassign

Unconfirmed Assignments: 0

From:

☐ Worker ID: Select

☒ Case Number: Select

☐ From Any Eligible Position Office: CalSAWS Project Office Select

Reassign Quantity:

☒ Number of Cases:

☐ Entire Workload

Program: * Language: *

Workload Reassignment Detail Page

12. Enter the Case Number as highlighted below.

CalSAWS

Santa Clara CCI

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Workload Assignment

Workload Reassignment

Workload Reassignment Confirmation

Pending Workload Assignments

Individual Reassignment

Workload Reassignment Detail

* - Indicates required fields

Reassign

Unconfirmed Assignments: 0

From:

☐ Worker ID: Select

☒ Case Number: 1B9A2E0 Select

☐ From Any Eligible Position Office: CalSAWS Project Office Select

Reassign Quantity:

☒ Number of Cases:

☐ Entire Workload

Program: * Language: *

Workload Reassignment Detail Page

13. Select the program given in the Worker Reassignment [Excel/CSV] sheet.

CalSAWS

Santa Clara CCI

Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Reassign Quantity:

Number of Cases:

Entire Workload

Program: * Language: *

Any

Case Flag: Status:

To:

Worker ID:

Select

Unit Office: Select Unit:

Workload Reassignment Detail Page

14. Click the "Select" button under the Worker ID as highlighted below.

CalSAWS

Santa Clara CCI

Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Reassign Quantity:

Number of Cases:

Entire Workload

Program: * Language: *

Any

Case Flag: Status:

To:

Worker ID:

Select

Unit Office: Select Unit:

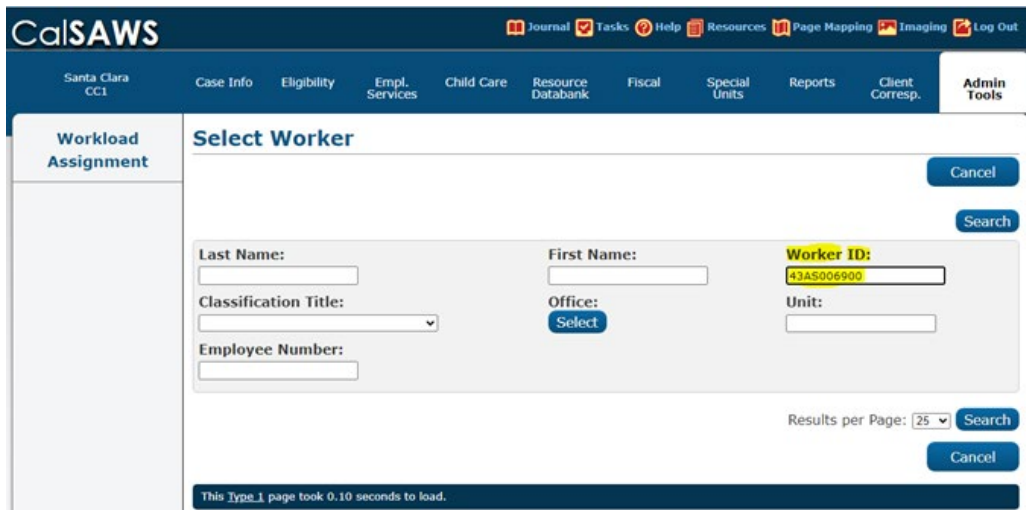
Auto Assign to Eligible Positions

Office: ☐ CalSAWS Project Office

Select Remove

Workload Reassignment Detail Page

15. Enter the worker id as highlighted below and click Search button.



CalSAWS

Santa Clara CC1

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Workload Assignment

Select Worker

Cancel

Search

Last Name: First Name: Worker ID: 43AS006900

Classification Title: Office: Select Unit:

Employee Number:

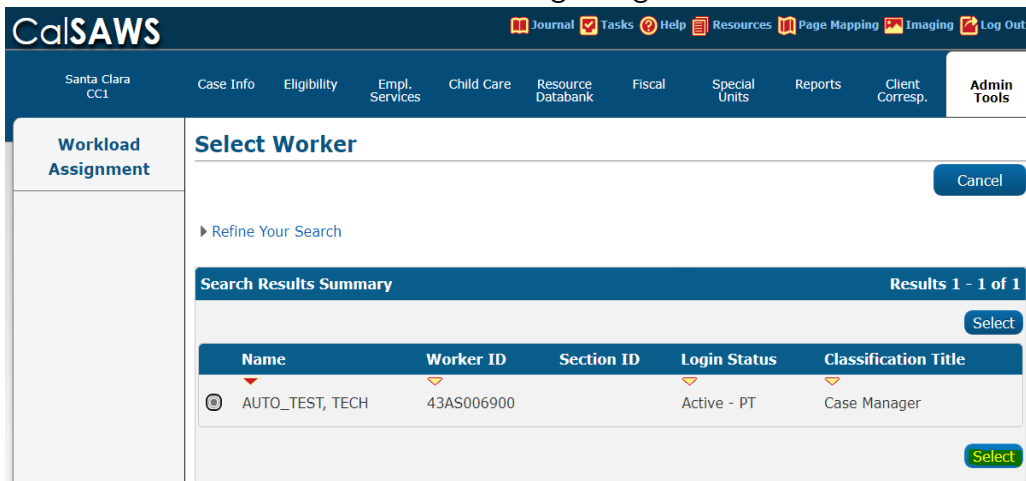
Results per Page: 25 Search

Cancel

This Type 1 page took 0.10 seconds to load.

Workload Reassignment Detail Page

16. Click the "Select" button after selecting the given worker ID check box.



CalSAWS

Santa Clara CC1

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Workload Assignment

Select Worker

Cancel

Refine Your Search

Search Results Summary Results 1 - 1 of 1

Select

Name	Worker ID	Section ID	Login Status	Classification Title
<input checked="" type="checkbox"/> AUTO_TEST, TECH	43AS006900		Active - PT	Case Manager

Select

Workload Reassignment Detail Page

17. Check the select worker ID is displayed as highlighted below.

The screenshot shows the CalSAWS interface for Santa Clara CC1. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main navigation bar lists various modules: Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The 'To:' section contains the following fields:

- Worker ID:** A radio button is selected next to the label. Below it, the value '43AS006900' is displayed and highlighted in yellow. There are 'Select' and 'Remove' buttons next to it.
- Unit:** A radio button is selected next to the label.
- Office:** A dropdown menu is set to 'Unit:'. Below it, the text 'Office: CalSAWS Project Office' is displayed with 'Select' and 'Remove' buttons.
- Auto Assign to Eligible Positions:** A radio button is selected next to the label.
- Auto Assign to Eligible Position in County:** A radio button is selected next to the label.
- Effective Date:** A section header with a dropdown menu.
- Effective Date:** A radio button is selected next to the label, followed by a text input field.
- Immediate Assignment:** A radio button is selected next to the label.

Workload Reassignment Detail Pag

18. Click "Immediate Assignment" check box as highlighted below.

This screenshot is identical to the previous one, showing the CalSAWS interface for Santa Clara CC1. The 'To:' section contains the same fields as before. The 'Immediate Assignment' radio button is now highlighted in yellow, indicating it is the selected option.

Workload Reassignment Detail Page

19. Select "No" from "Automatically Reassign When Activated" drop down box.

The screenshot shows the CalSAWS interface with the 'Workload Reassignment Detail Page' for Santa Clara CC1. The 'Effective Date' section has 'Immediate Assignment' selected. In the 'Reassignment Option' section, the 'Automatically Reassign When Activated' dropdown is set to 'No'. The 'Print New Worker Letter' checkbox is unchecked. A 'Reassign' button is at the bottom right.

Workload Reassignment Detail Page

20. Select "Print New Worker Letter" check box if the option in the Worker Reassignment [Excel\CSV] file is given as "Yes".

This screenshot is similar to the previous one, but the 'Print New Worker Letter' checkbox in the 'Reassignment Option' section is now checked. The 'Automatically Reassign When Activated' dropdown remains set to 'No'.

Workload Reassignment Detail Page

21. Click on "Reassign" button as highlighted below.

This screenshot shows the same form as the previous ones, but the 'Reassign' button at the bottom right is highlighted with a yellow border, indicating it should be clicked.

Workload Reassignment Detail Page

5 EXCEPTION HANDLING

5.1 Business Exception

	Exception Title	Reason	Outcome
1.	“Invalid Case Number or No Case number found “.		Logged in the exception report
2.	Invalid worker id or Worker id not found “.		Logged in the exception report
3.	Program not found		Logged in the exception report
4.	Worker Reassignment [Excel/CSV] not Found	file missing	Send exception email to business and RPA support team
5.	Data Not Found in Worker Reassignment [Excel/CSV]	Data missing in Worker Reassignment	Send exception email to business and RPA support team
6.	Transaction Data Field Mismatch	Expected fields in transaction data cannot be found or do not match predefined naming convention	Send exception email to support team.

5.2 System Exception

For System Exceptions, the automation will attempt to complete the transaction three times. In the table below, the detailed Outcome refers to the steps the bot will take after the last retry for a transaction.

	Exception Title	Reason	Outcome
1.	Not able to access CalSAWS application	NA	Exception email to RPA support team
2.	Not able to login into access CalSAWS application		Exception email to RPA support team
3.	Application latency/timeout		Exception email to RPA support team

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-264616

ACL 22-67 - STAT 47 updates to match CalFresh
E&T rule (Reports Component)

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Susanna Martinez
	Reviewed By	Ravneet Bhatia, Jeric Derama, Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/01/2023	1	Initial Document	Susanna Martinez

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1 OVERVIEW

As a result of the Employment & Training (E&T) Final Rule, ACL 22-67, and ACL 22-67E were published to update the STAT 47 report to align with new CalFresh employment and training program components. Such changes affect the following areas:

- Qualifying CalFresh E&T components and activities that meet the ABAWD work requirement
- CalFresh E&T work experience component definition
- Reporting requirements

SCR CA-230837 updated the system to remove and introduce the new customer activities to align with the new CalFresh E&T components per ACL 22-26, 22-41, 22-67 and 22-67E. This SCR, CA-264616, will update the STAT 47 and STAT 47 Part F Backup Report to implement the CFET components updated in SCR CA-230837 and GROW activities updated in SCR CA-254559 to align with the CalFresh E&T components changes per ACL 22-67 and ACL 22-67E.

A CalFresh E&T component is defined as a service, activity, or program designed to help CalFresh recipients gain skills, training, or work experience. Multiple activities may exist under each component. The STAT 47 report counts both CalFresh E&T (CFET) components and GROW activities towards the CalFresh E&T components listed in the report. Both the CFET components and GROW activities that are captured under each of the CFET components on the STAT 47 are defined by customer activities within the CalSAWS system.

1.1 Current Design

The STAT 47 and STAT 47 Part F Backup Report currently use the CalFresh E&T components (CFET components) listed below and considers other components offered by the county:

- Job Search
- Job Club
- Workfare
- Self-Initiated Workfare
- Work Experience
- Vocational Training
- Education
- Job Retention

1.2 Requests

1. Update the STAT 47 to align with new CalFresh E&T program components changes outlined in ACL 22-67 and ACL 22-67E.

1.3 Overview of Recommendations

1. Update the STAT 47 state report template to adhere to standards per ACL 22-67 and ACL 22-67E.
2. Update the STAT 47 state report logic to account for the removal of current CalFresh E&T components and addition of new CalFresh E&T components per ACL 22-67 and ACL 22-67E. The updated customer activities done under SCR CA-230837 will be used to map to the new CalFresh E&T components.
3. Update the current GROW customer activities counted in the STAT 47 and new GROW customer activities (SCR CA-254559) to map to the new CalFresh E&T components.
4. Update the STAT 47 Part F Backup Report template to accommodate changes per ACL 22-67 and ACL 22-67E.
5. Update the STAT 47 Part F Backup Report logic to accommodate changes per ACL 22-67 and ACL 22-67E.

1.4 Assumptions

1. The updated customer activities done under SCR CA-230837 will be used to map to the new CFET components.
2. SCR CA-230837 provided the counties with a case list of affected cases having activities that need to be end-dated and added to a new activity countable towards one of the new CFET components on the STAT 47. This was provided to assist the counties in editing cases needing to be remapped to one of the updated activities, ensuring they are captured at the time of the next STAT 47 report generation following the updates made per this SCR, CA-264616. "CIT 0079-24 New CFET Activities and CA-230837 Lists of CFET Activities and Resources with Services Removed" was shared with the counties to address this.
3. The mapping of GROW customer activities to the new CFET components depends on the completion of changes to the GROW customer activities done under SCR CA-254559.
4. SCR CA-280180 will address and implement the 90-day lookback criteria per ACL 22-67E.
5. SCR CA-266312 updated the ABAWD age limit and added exemptions for homeless individuals, veterans, and Foster Care individuals. These changes are being picked up by the STAT 47.
6. The user should select the 'EDU Prog. Basic (EPB)' component if the participant is in ABE, HSD and GED, in order to be counted towards the Education Program Basic (EPB) CFET component on the STAT 47.
7. The user should select the 'EDU Prog. Career (EPC)' component if the participant is in CTE and Vocational Training, in order to be counted towards the Education Program Career (EPC) CFET component on the STAT 47.
8. The user should select the 'EDU Prog. English Language (EPEL)' component if the participant is in ESL and ELL, in order to be counted towards the Education Program English Language (EPEL) CFET component on the STAT 47.

9. The user should select the 'EDU Prog. Integrated (EPI)' component if the participant is in Bridge Programs, in order to be counted towards the Education Program Integrated (EPI) CFET component on the STAT 47.

2 RECOMMENDATIONS

2.1 STAT 47

2.1.1 Overview

The STAT 47 is formerly known as the 'Non-Assistance CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report' and will be re-named to 'CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report'. It is a state report that provides data on CalFresh recipients, monthly caseload data, the ABAWD population, and the work registrant population both in county-administered ET programs and non-ET counties. This quarterly report is available on the second business day in January, April, July and October.

The STAT 47 will need to be updated to adhere to cosmetic standards and CalFresh E&T components (CFET components) changes per ACL 22-67 and ACL 22-67E.

2.1.2 STAT 47 Mockup

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES DATA SYSTEMS AND SURVEY DESIGN BUREAU			
Non-Assistance CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report STAT 47					
DOWNLOAD REPORT FORM FROM: http://www.cdss.ca.gov/dssdb E-MAIL REPORT FORM TO: admstat47@dss.ca.gov					
COUNTY NAME	VERSION	REPORT QUARTER	REPORT YEAR		
San Bernardino	<input type="checkbox"/> INITIAL <input type="checkbox"/> REVISED	Jul. - Sep.	2022/2023		
PART A. WORK REGISTRANT AND ABAWD INFORMATION					
(All Counties)					
Count each work registrant and ABAWD in only one month during FFY.					
	Month 1	Month 2	Month 3	Quarter Total (D)	
1. Unduplicated new work registrants during the quarter.....	(A)	(B)	(C)		
2. Unduplicated new ABAWDs during the quarter (Include in Item 1).....	1,574	2,608	1,948	6,130	
3. ABAWDs exempt under the 15% criteria during the quarter.....	744	1,123	859	2,726	
PART B. NEW INDIVIDUAL E&T PARTICIPANTS					
(E&T Counties Only)					
Count each participant in only one month during FFY.					
	Month 1	Month 2	Month 3	Quarter Total (D)	
4. New individuals who participated in E&T during the quarter (Items 4a plus 4b).....	(A)	(B)	(C)		
a. Unduplicated ABAWD participants.....	28	5	1	34	
b. Unduplicated non-ABAWD participants.....	15	0	0	15	
PART C. NEW E&T COMPONENT PLACEMENTS (E&T Counties Only)					
For each component placement, count the participants in only one month during FFY.					
	Month 1	Month 2	Month 3	Quarter Total (D)	
5. New job search participants placed during the quarter (Items 5a plus 5b).....	(A)	(B)	(C)		
a. ABAWD placements.....	10	3	0	13	
b. Non-ABAWD placements.....	6	0	0	6	
6. New job club participants placed during the quarter (Items 6a plus 6b).....	4	3	0	7	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
7. New workforce participants placed during the quarter (Items 7a plus 7b).....	18	3	1	22	
a. ABAWD participants.....	9	3	1	13	
b. Non-ABAWD placements.....	9	0	0	9	
8. New self-initiated workforce participants placed during the quarter (Items 8a plus 8b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
9. New work experience (on-the-job training OJT) participants placed during the quarter (Items 9a plus 9b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
10. New vocational training participants placed during the quarter (Items 10a plus 10b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
11. New education participants placed during the quarter (Items 11a plus 11b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
12. New job retention participants placed during the quarter (Items 12a plus 12 b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
13. New participants placed in other components offered by the county during the quarter (Items 13a plus 13b).....	0	0	0	0	
a. ABAWD placements (List components in Item 13a/13b explanation box).....	0	0	0	0	
b. Non-ABAWD placements (List components in Item 13a/13b explanation box).....	0	0	0	0	
14. Total of new unduplicated placements in all component categories during the quarter (Items 14a plus 14b).....	28	6	1	35	
a. ABAWD placements.....	15	0	0	15	
b. Non-ABAWD placements.....	13	6	1	20	
PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS					
(E&T Counties Only)					
Count each participant in each applicable month each quarter.					
	Month 1	Month 2	Month 3	Quarter Total (D)	
15. Job search participants by month during the quarter (Items 15a plus 15b).....	(A)	(B)	(C)		
a. ABAWD placements.....	26	24	19	69	
b. Non-ABAWD placements.....	10	13	8	29	
16. Job club participants by month during the quarter (Items 16a plus 16b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
17. Workforce participants by month during the quarter (Items 17a plus 17b).....	50	45	41	136	
a. ABAWD placements.....	28	24	22	74	
b. Non-ABAWD placements.....	22	21	19	62	
18. Self-initiated workforce participants by month during the quarter (Items 18a plus 18b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
19. Work experience (OJT) participants by month during the quarter (Items 19a plus 19b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
20. Vocational training participants by month during the quarter (Items 20a plus 20b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
21. Education participants by month during the quarter (Items 21a plus 21b).....	0	0	0	0	
a. ABAWD placements.....	0	0	0	0	
b. Non-ABAWD placements.....	0	0	0	0	
22. Job retention participants by month during the quarter (Items 22a plus 22b).....	1	1	1	3	
a. ABAWD placements.....	1	1	1	3	
b. Non-ABAWD placements.....	0	0	0	0	
23. Participants in other components offered by the county by month during the quarter (Items 23a plus 23b).....	0	0	0	0	
a. ABAWD placements (List components in Item 23a/23b explanation box).....	0	0	0	0	
b. Non-ABAWD placements (List components in Item 23a/23b explanation box).....	0	0	0	0	
PART E. E&T TOTALS FOR THE FNS 583					
(Automatically calculated)					
	Month 1	Month 2	Month 3	Quarter Total (D)	
24. ABAWDs that participated in a qualifying E&T component by month during the quarter (Sum of Items 17a through 23a).....	(A)	(B)	(C)		
25. ABAWDs that participated in a non-qualifying E&T component by month during the quarter (Items 15a plus 16a).....	16	13	11	40	
26. Non-ABAWDs that participated in an E&T component by month during the quarter (Sum of Items 15b through 23b).....	33	32	27	92	
27. E&T participants who are not ABAWDs in qualifying components by month during the quarter (Items 25 plus 26).....	49	45	38	132	
PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS (All Counties)					
The review period for Items 28 and 29 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.					
28. Work registrants on October 1.....					769
29. ABAWDs on October 1 (Include in Item 28).....					770
COMMENTS:					
REVISED REPORT EXPLANATION					
ITEMS 13a/13b NEW PARTICIPANTS PLACED IN OTHER COMPONENTS EXPLANATION (Complete if Cells 121-132 are not all zero)					
ITEMS 23a/23b PERSONS PARTICIPATING IN OTHER COMPONENTS EXPLANATION (Complete if Cells 241-252 are not all zero)					
CONTACT PERSON		TELEPHONE	EXTENSION	FAX	
JOB TITLE/CLASSIFICATION		E-MAIL	DATE SUBMITTED		

Figure 2.1.2.1 – STAT 47 Summary Sheet Mockup Before Changes

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES DATA SYSTEMS AND SURVEY DESIGN BUREAU	
CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report STAT 47		DOWNLOAD REPORT FORM FROM: http://www.cdss.ca.gov/dssdb E-MAIL REPORT FORM TO: admstat47@dss.ca.gov	
COUNTY NAME San Bernardino	VERSION <input type="checkbox"/> INITIAL <input type="checkbox"/> REVISED	REPORT QUARTER Oct. - Dec.	REPORT YEAR 2023/2024
PART A. WORK REGISTRANT AND ABAWD INFORMATION (All Counties) Count each work registrant and ABAWD in only one month during FFY.		Month 1 (A)	Month 2 (B)
1. Unduplicated new work registrants during the quarter.....		0	0
2. Unduplicated new ABAWDs during the quarter (Include in Item 1).....		0	0
3. Total number of discretionary exemptions used during the quarter.....		0	0
PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in only one month during FFY.		Month 1 (A)	Month 2 (B)
4. New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter (Items 4a plus 4b).....		0	0
a. Unduplicated ABAWD participants.....		0	0
b. Unduplicated non-ABAWD participants.....		0	0
PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.		Month 1 (A)	Month 2 (B)
5. New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0
6. New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c).....		0	0
a. ABAWD in qualifying component placements (WIOA and Veterans Programs).....		0	0
b. Non-ABAWD placements.....		0	0
c. ABAWD in non-qualifying component placements.....		0	0
7. New Workfare (W) participants placed during the quarter (Items 7a plus 7b).....		0	0
a. ABAWD participants.....		0	0
b. Non-ABAWD placements.....		0	0
8. New Self-Employment Training (SET) participants placed during the quarter (Items 8a plus 8b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0
9. New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0
Education Components			
10. New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0
11. New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0
12. New Education Program English Language (EPEL) participants placed during the quarter (includes ESL and ELL) (Items 12a plus 12b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0
13. New Education Program Integrated (EPI) participants placed during the quarter (includes Bridge Programs) (Items 13a plus 13b).....		0	0
a. ABAWD placements (List components in Item 13a/13b explanation box).....		0	0
b. Non-ABAWD placements (List components in Item 13a/13b explanation box).....		0	0
14. New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b).....		0	0
a. ABAWD placements.....		0	0
b. Non-ABAWD placements.....		0	0

Work Experience Components							
36. Work Activity (WA) participants by month during the quarter (Items 36a plus 36b).....	405	0	406	0	407	0	408
a. ABAWD placements.....	409	0	410	0	411	0	412
b. Non-ABAWD placements.....	413	0	414	0	415	0	416
37. Work-Based Learning Internship (WBLI) participants by month during the quarter (Items 37a plus 37b).....	417	0	418	0	419	0	420
a. ABAWD placements.....	421	0	422	0	423	0	424
b. Non-ABAWD placements.....	425	0	426	0	427	0	428
38. Work-Based Learning Internship Subsidized (WBLI-SUB) participants by month during the quarter (Items 38a plus 38b).....	429	0	430	0	431	0	432
a. ABAWD placements.....	433	0	434	0	435	0	436
b. Non-ABAWD placements.....	437	0	438	0	439	0	440
39. Work-Based Learning On-the-Job Training (WBLTJT) participants by month during the quarter (Items 39a plus 39b).....	441	0	442	0	443	0	444
a. ABAWD placements.....	445	0	446	0	447	0	448
b. Non-ABAWD placements.....	449	0	450	0	451	0	452
40. Work-Based Learning Pre-apprenticeship (WBLPA) participants by month during the quarter (Items 40a plus 40b).....	453	0	454	0	455	0	456
a. ABAWD placements.....	457	0	458	0	459	0	460
b. Non-ABAWD placements.....	461	0	462	0	463	0	464
41. Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants by month during the quarter (Items 41a plus 41b).....	465	0	466	0	467	0	468
a. ABAWD placements.....	469	0	470	0	471	0	472
b. Non-ABAWD placements.....	473	0	474	0	475	0	476
42. Work-Based Learning Apprenticeship (WBLA) participants by month during the quarter (Items 42a plus 42b).....	477	0	478	0	479	0	480
a. ABAWD placements.....	481	0	482	0	483	0	484
b. Non-ABAWD placements.....	485	0	486	0	487	0	488
43. Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants by month during the quarter (Items 43a plus 43b).....	489	0	490	0	491	0	492
a. ABAWD placements.....	493	0	494	0	495	0	496
b. Non-ABAWD placements.....	497	0	498	0	499	0	500
44. Work-Based Learning Transitional Jobs (WBLTJ) participants by month during the quarter (Items 44a plus 44b).....	501	0	502	0	503	0	504
a. ABAWD placements.....	505	0	506	0	507	0	508
b. Non-ABAWD placements.....	509	0	510	0	511	0	512
45. Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants by month during the quarter (Items 45a plus 45b).....	513	0	514	0	515	0	516
a. ABAWD placements.....	517	0	518	0	519	0	520
b. Non-ABAWD placements.....	521	0	522	0	523	0	524
46. Work-Based Learning Other (WBLO) participants by month during the quarter (Items 46a plus 46b).....	525	0	526	0	527	0	528
a. ABAWD placements.....	529	0	530	0	531	0	532
b. Non-ABAWD placements.....	533	0	534	0	535	0	536
47. Work-Based Learning Other Subsidized (WBLO-SUB) participants by month during the quarter (Items 47a plus 47b).....	537	0	538	0	539	0	540
a. ABAWD placements.....	541	0	542	0	543	0	544
b. Non-ABAWD placements.....	545	0	546	0	547	0	548

PART E. E&T TOTALS FOR THE FNS 583 (Automatically calculated)		Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
48. ABAWDs that participated in a qualifying CalFresh E&T component by month during the quarter (Sum of Items 27a through 47a).....	549	0	550	0	551
49. ABAWDs that participated in a non-qualifying CalFresh E&T component by month during the quarter (Count of Item 27c).....	553	0	554	0	555
50. CalFresh E&T participants who are not ABAWDs in a component by month during the quarter (Sum of Items 27b through 47b plus the count of Item 49).....	557	0	558	0	559

PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS The review period for Items 51, 52 and 53 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.		October 1
51. Work registrants on October 1.....		561
52. ABAWDs on October 1 (Include total ABAWD count in cell 561).....		562
53. CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only).....		563

COMMENTS:			
REVISED REPORT EXPLANATION			
CONTACT PERSON	TELEPHONE	EXTENSION	FAX
JOB TITLE/CLASSIFICATION	E-MAIL		
SUPERVISOR	TELEPHONE	EXTENSION	FAX
JOB TITLE/CLASSIFICATION	E-MAIL		
DATE SUBMITTED			

Figure 2.1.2.2 – STAT 47 Summary Sheet Mockup After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY									
Non-Assistance CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report STAT 47									

Figure 2.1.2.3 – STAT 47 Summary Sheet Mockup Before Title Changes

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY									
CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report STAT 47									

Figure 2.1.2.4 – STAT 47 Summary Sheet Mockup After Title Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

PART A. WORK REGISTRANT AND ABAWD INFORMATION (All Counties) Count each work registrant and ABAWD in only one month during FFY.									
1. Unduplicated new work registrants during the quarter.....									
2. Unduplicated new ABAWDs during the quarter (Include in Item 1).....									
3. ABAWDs exempt under the 15% criteria during the quarter.....									

Figure 2.1.2.5– STAT 47 Summary Sheet Item 3 Before Changes

PART A. WORK REGISTRANT AND ABAWD INFORMATION (All Counties) Count each work registrant and ABAWD in only one month during FFY.									
1. Unduplicated new work registrants during the quarter.....									
2. Unduplicated new ABAWDs during the quarter (Include in Item 1).....									
3. Total number of discretionary exemptions used during the quarter.....									

Figure 2.1.2.6 – STAT 47 Summary Sheet Item 3 After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

PART B. NEW INDIVIDUAL E&T PARTICIPANTS (E&T Counties Only) Count each participant in only one month during FFY.	
4. New individuals who participated in E&T during the quarter (Items 4a plus 4b).....	
a. Unduplicated ABAWD participants.....	
b. Unduplicated non-ABAWD participants.....	

Figure 2.1.2.7 – STAT 47 Summary Sheet PART B Before Changes

PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in only one month during FFY.	
4. New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter (Items 4a plus 4b).....	
a. Unduplicated ABAWD participants.....	
b. Unduplicated non-ABAWD participants.....	

Figure 2.1.2.8 – STAT 47 Summary Sheet PART B After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

PART C. NEW E&T COMPONENT PLACEMENTS (E&T Counties Only) For each component placement, count the participants in only one month during FFY.		Month 1	Month 2	Month 3	Quarter Total
		(A)	(B)	(C)	(D)
5. New job search participants placed during the quarter (Items 5a plus 5b).....	55	10	3	0	13
a. ABAWD placements.....	59	6	0	0	6
b. Non-ABAWD placements.....	63	4	3	0	7
6. New job club participants placed during the quarter (Items 6a plus 6b).....	67	0	0	0	0
a. ABAWD placements.....	71	0	0	0	0
b. Non-ABAWD placements.....	75	0	0	0	0
7. New workfare participants placed during the quarter (Items 7a plus 7b).....	79	18	3	1	22
a. ABAWD participants.....	83	2	0	0	9
b. Non-ABAWD placements.....	87	9	3	1	13
8. New self-initiated workfare participants placed during the quarter (Items 8a plus 8b).....	91	0	0	0	0
a. ABAWD placements.....	95	0	0	0	0
b. Non-ABAWD placements.....	99	0	0	0	0
9. New work experience (on-the-job training OJT) participants placed during the quarter (Items 9a plus 9b).....	103	0	0	0	0
a. ABAWD placements.....	107	0	0	0	0
b. Non-ABAWD placements.....	111	0	0	0	0
10. New vocational training participants placed during the quarter (Items 10a plus 10b).....	115	0	0	0	0
a. ABAWD placements.....	119	0	0	0	0
b. Non-ABAWD placements.....	123	0	0	0	0
11. New education participants placed during the quarter (Items 11a plus 11b).....	127	0	0	0	0
a. ABAWD placements.....	131	0	0	0	0
b. Non-ABAWD placements.....	135	0	0	0	0
12. New job retention participants placed during the quarter (Items 12a plus 12 b).....	139	0	0	0	0
a. ABAWD placements.....	143	0	0	0	0
b. Non-ABAWD placements.....	147	0	0	0	0
13. New participants placed in other components offered by the county during the quarter (Items 13a plus 13b).....	151	0	0	0	0
a. ABAWD placements (List components in Item 13a/13b explanation box).....	155	0	0	0	0
b. Non-ABAWD placements (List components in Item 13a/13b explanation box).....	159	0	0	0	0
14. Total of new unduplicated placements in all component categories during the quarter (Items 14a plus 14b).....	163	28	6	1	35
a. ABAWD placements.....	167	15	0	0	15
b. Non-ABAWD placements.....	171	13	6	1	20

Figure 2.1.2.9 – STAT 47 Summary Sheet PART C Before Changes

PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.		Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
5. New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b).....	25	0	26	0	26
a. ABAWD placements.....	29	0	30	0	30
b. Non-ABAWD placements.....	33	0	34	0	34
6. New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c).....	37	0	38	0	38
a. ABAWD in qualifying component placements (WIOA and Veterans Programs).....	41	0	42	0	42
b. Non-ABAWD placements.....	45	0	46	0	46
c. ABAWD in non-qualifying component placements.....	49	0	50	0	50
7. New Workfare (W) participants placed during the quarter (Items 7a plus 7b).....	53	0	54	0	54
a. ABAWD participants.....	57	0	58	0	58
b. Non-ABAWD placements.....	61	0	62	0	62
8. New Self-Employment Training (SET) participants placed during the quarter (Items 8a plus 8b).....	65	0	66	0	66
a. ABAWD placements.....	69	0	70	0	70
b. Non-ABAWD placements.....	73	0	74	0	74
9. New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b).....	77	0	78	0	78
a. ABAWD placements.....	81	0	82	0	82
b. Non-ABAWD placements.....	85	0	86	0	86
Education Components					
10. New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b).....	89	0	90	0	90
a. ABAWD placements.....	93	0	94	0	94
b. Non-ABAWD placements.....	97	0	98	0	98
11. New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b).....	101	0	102	0	102
a. ABAWD placements.....	105	0	106	0	106
b. Non-ABAWD placements.....	109	0	110	0	110
12. New Education Program English Language (EPEL) participants placed during the quarter (includes ESL and ELL) (Items 12a plus 12b).....	113	0	114	0	114
a. ABAWD placements.....	117	0	118	0	118
b. Non-ABAWD placements.....	121	0	122	0	122
13. New Education Program Integrated (EPI) participants placed during the quarter (includes Bridge Programs) (Items 13a plus 13b).....	125	0	126	0	126
a. ABAWD placements (List components in Item 13a/13b explanation box).....	129	0	130	0	130
b. Non-ABAWD placements (List components in Item 13a/13b explanation box).....	133	0	134	0	134
14. New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b).....	137	0	138	0	138
a. ABAWD placements.....	141	0	142	0	142
b. Non-ABAWD placements.....	145	0	146	0	146
Work Experience Components					
15. New Work Activity (WA) participants placed during the quarter (Items 15a plus 15b).....	149	0	150	0	150
a. ABAWD placements.....	153	0	154	0	154
b. Non-ABAWD placements.....	157	0	158	0	158
16. New Work-Based Learning Internship (WBLI) participants placed during the quarter (Items 16a plus 16b).....	161	0	162	0	162
a. ABAWD placements.....	165	0	166	0	166
b. Non-ABAWD placements.....	169	0	170	0	170
17. New Work-Based Learning Internship Subsidized (WBLI-SUB) participants placed during the quarter (Items 17a plus 17b).....	173	0	174	0	174
a. ABAWD placements.....	177	0	178	0	178
b. Non-ABAWD placements.....	181	0	182	0	182
18. New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b).....	185	0	186	0	186
a. ABAWD placements.....	189	0	190	0	190
b. Non-ABAWD placements.....	193	0	194	0	194
19. New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b).....	197	0	198	0	198
a. ABAWD placements.....	201	0	202	0	202
b. Non-ABAWD placements.....	205	0	206	0	206
20. New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b).....	209	0	210	0	210
a. ABAWD placements.....	213	0	214	0	214
b. Non-ABAWD placements.....	217	0	218	0	218
21. New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b).....	221	0	222	0	222
a. ABAWD placements.....	225	0	226	0	226
b. Non-ABAWD placements.....	229	0	230	0	230
22. New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b).....	233	0	234	0	234
a. ABAWD placements.....	237	0	238	0	238
b. Non-ABAWD placements.....	241	0	242	0	242
23. New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b).....	245	0	246	0	246
a. ABAWD placements.....	249	0	250	0	250
b. Non-ABAWD placements.....	253	0	254	0	254
24. New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b).....	257	0	258	0	258
a. ABAWD placements.....	261	0	262	0	262
b. Non-ABAWD placements.....	265	0	266	0	266
25. New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b).....	269	0	270	0	270
a. ABAWD placements.....	273	0	274	0	274
b. Non-ABAWD placements.....	277	0	278	0	278
26. New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b).....	281	0	282	0	282
a. ABAWD placements.....	285	0	286	0	286
b. Non-ABAWD placements.....	289	0	290	0	290

Figure 2.1.2.10 – STAT 47 Summary Sheet PART C After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (E&T Counties Only) Count each participant in each applicable month each quarter.		Month 1	Month 2	Month 3	Quarter Total
		(A)	(B)	(C)	(D)
15. Job search participants by month during the quarter (Items 15a plus 15b).....	245	26	24	19	69
a. ABAWD placements.....	249	16	13	11	40
b. Non-ABAWD placements.....	253	10	11	8	29
16. Job club participants by month during the quarter (Items 16a plus 16b).....	257	0	0	0	0
a. ABAWD placements.....	261	0	0	0	0
b. Non-ABAWD placements.....	265	0	0	0	0
17. Workfare participants by month during the quarter (Items 17a plus 17b).....	269	50	45	41	136
a. ABAWD placements.....	273	28	24	22	74
b. Non-ABAWD placements.....	277	22	21	19	62
18. Self-initiated workfare participants by month during the quarter (Items 18a plus 18b).....	281	0	0	0	0
a. ABAWD placements.....	285	0	0	0	0
b. Non-ABAWD placements.....	289	0	0	0	0
19. Work experience (OJT) participants by month during the quarter (Items 19a plus 19b).....	293	0	0	0	0
a. ABAWD placements.....	297	0	0	0	0
b. Non-ABAWD placements.....	301	0	0	0	0
20. Vocational training participants by month during the quarter (Items 20a plus 20b).....	305	0	0	0	0
a. ABAWD placements.....	309	0	0	0	0
b. Non-ABAWD placements.....	313	0	0	0	0
21. Education participants by month during the quarter (Items 21a plus 21b).....	317	0	0	0	0
a. ABAWD placements.....	321	0	0	0	0
b. Non-ABAWD placements.....	325	0	0	0	0
22. Job retention participants by month during the quarter (Items 22a plus 22b).....	329	1	1	1	3
a. ABAWD placements.....	333	1	1	1	3
b. Non-ABAWD placements.....	337	0	0	0	0
23. Participants in other components offered by the county by month during the quarter (Items 23a plus 23b).....	341	0	0	0	0
a. ABAWD placements (List components in Item 23a/23b explanation box).....	345	0	0	0	0
b. Non-ABAWD placements (List components in Item 23a/23b explanation box).....	349	0	0	0	0

Figure 2.1.2.11 – STAT 47 Summary Sheet PART D Before Changes

PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.		Month 1	Month 2	Month 3	Quarter Total
		(A)	(B)	(C)	(D)
27. Supervised Job Search (SJS) participants by month during the quarter (Items 27a plus 27b plus 27c).....	293	0	0	0	0
a. ABAWD in qualifying component placements (WIOA and Veterans Programs).....	297	0	0	0	0
b. Non-ABAWD placements.....	301	0	0	0	0
c. ABAWD in non-qualifying component placements.....	305	0	0	0	0
28. Workfare (W) participants by month during the quarter (Items 28a plus 28b).....	309	0	0	0	0
a. ABAWD placements.....	313	0	0	0	0
b. Non-ABAWD placements.....	317	0	0	0	0
29. Self-Employment Training (SET) participants by month during the quarter (Items 29a plus 29b).....	321	0	0	0	0
a. ABAWD placements.....	325	0	0	0	0
b. Non-ABAWD placements.....	329	0	0	0	0
30. Job Retention (JR) participants by month during the quarter (Items 30a plus 30b).....	333	0	0	0	0
a. ABAWD placements.....	337	0	0	0	0
b. Non-ABAWD placements.....	341	0	0	0	0
Education Components					
31. Education Program Basic (EPB) participants placed by month during the quarter (includes ABE, HSD and GED) (Items 31a plus 31b).....	345	0	0	0	0
a. ABAWD placements.....	349	0	0	0	0
b. Non-ABAWD placements.....	353	0	0	0	0
32. Education Program Career (EPC) participants by month during the quarter (includes CTE and Vocational training) (Items 32a plus 32b).....	357	0	0	0	0
a. ABAWD placements.....	361	0	0	0	0
b. Non-ABAWD placements.....	365	0	0	0	0
33. Education Program English Language (EPEL) participants by month during the quarter (includes ESL and ELL) (Items 33a plus 33b).....	369	0	0	0	0
a. ABAWD placements.....	373	0	0	0	0
b. Non-ABAWD placements.....	377	0	0	0	0
34. Education Program Integrated (EPI) participants by month during the quarter (includes Bridge Programs) (Items 34a plus 34b).....	381	0	0	0	0
a. ABAWD placements.....	385	0	0	0	0
b. Non-ABAWD placements.....	389	0	0	0	0
35. Education Program Work Readiness Training (EPWRT) participants by month during the quarter (Items 35a plus 35b) a. ABAWD placements.....	393	0	0	0	0
b. Non-ABAWD placements.....	397	0	0	0	0
	401	0	0	0	0

Work Experience Components							
36. Work Activity (WA) participants by month during the quarter (Items 36a plus 36b).....	405	0	406	0	407	0	408
a. ABAWD placements.....	409	0	410	0	411	0	412
b. Non-ABAWD placements.....	413	0	414	0	415	0	416
37. Work-Based Learning Internship (WBLI) participants by month during the quarter (Items 37a plus 37b).....	417	0	418	0	419	0	420
a. ABAWD placements.....	421	0	422	0	423	0	424
b. Non-ABAWD placements.....	425	0	426	0	427	0	428
38. Work-Based Learning Internship Subsidized (WBLI-SUB) participants by month during the quarter (Items 38a plus 38b).....	429	0	430	0	431	0	432
a. ABAWD placements.....	433	0	434	0	435	0	436
b. Non-ABAWD placements.....	437	0	438	0	439	0	440
39. Work-Based Learning On-the-Job Training (WBL-OJT) participants by month during the quarter (Items 39a plus 39b).....	441	0	442	0	443	0	444
a. ABAWD placements.....	445	0	446	0	447	0	448
b. Non-ABAWD placements.....	449	0	450	0	451	0	452
40. Work-Based Learning Pre-apprenticeship (WBLPA) participants by month during the quarter (Items 40a plus 40b).....	453	0	454	0	455	0	456
a. ABAWD placements.....	457	0	458	0	459	0	460
b. Non-ABAWD placements.....	461	0	462	0	463	0	464
41. Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants by month during the quarter (Items 41a plus 41b).....	465	0	466	0	467	0	468
a. ABAWD placements.....	469	0	470	0	471	0	472
b. Non-ABAWD placements.....	473	0	474	0	475	0	476
42. Work-Based Learning Apprenticeship (WBLA) participants by month during the quarter (Items 42a plus 42b).....	477	0	478	0	479	0	480
a. ABAWD placements.....	481	0	482	0	483	0	484
b. Non-ABAWD placements.....	485	0	486	0	487	0	488
43. Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants by month during the quarter (Items 43a plus 43b).....	489	0	490	0	491	0	492
a. ABAWD placements.....	493	0	494	0	495	0	496
b. Non-ABAWD placements.....	497	0	498	0	499	0	500
44. Work-Based Learning Transitional Jobs (WBLTJ) participants by month during the quarter (Items 44a plus 44b).....	501	0	502	0	503	0	504
a. ABAWD placements.....	505	0	506	0	507	0	508
b. Non-ABAWD placements.....	509	0	510	0	511	0	512
45. Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants by month during the quarter (Items 45a plus 45b).....	513	0	514	0	515	0	516
a. ABAWD placements.....	517	0	518	0	519	0	520
b. Non-ABAWD placements.....	521	0	522	0	523	0	524
46. Work-Based Learning Other (WBLO) participants by month during the quarter (Items 46a plus 46b).....	525	0	526	0	527	0	528
a. ABAWD placements.....	529	0	530	0	531	0	532
b. Non-ABAWD placements.....	533	0	534	0	535	0	536
47. Work-Based Learning Other Subsidized (WBLO-SUB) participants by month during the quarter (Items 47a plus 47b).....	537	0	538	0	539	0	540
a. ABAWD placements.....	541	0	542	0	543	0	544
b. Non-ABAWD placements.....	545	0	546	0	547	0	548

Figure 2.1.2.12 – STAT 47 Summary Sheet PART D After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

PART E. E&T TOTALS FOR THE FNS 583 (Automatically calculated)		Month 1	Month 2	Month 3	Quarter Total
		(A)	(B)	(C)	(D)
24. ABAWDs that participated in a qualifying E&T component by month during the quarter (Sum of Items 17a through 23a).....	253	28 ²⁵⁴	25 ²⁵⁵	23 ²⁵⁶	76
25. ABAWDs that participated in a non-qualifying E&T component by month during the quarter (Items 15a plus 16a).....	257	16 ²⁵⁸	13 ²⁵⁹	11 ²⁶⁰	40
26. Non-ABAWDs that participated in an E&T component by month during the quarter (Sum of Items 15b through 23b).....	261	33 ²⁶²	32 ²⁶³	27 ²⁶⁴	92
27. E&T participants who are not ABAWDs in qualifying components by month during the quarter (Items 25 plus 26).....	265	49 ²⁶⁶	45 ²⁶⁷	38 ²⁶⁸	132

Figure 2.1.2.13 – STAT 47 Summary Sheet PART E Before Changes

PART E. E&T TOTALS FOR THE FNS 583 (Automatically calculated)		Month 1	Month 2	Month 3	Quarter Total
		(A)	(B)	(C)	(D)
48. ABAWDs that participated in a qualifying CalFresh E&T component by month during the quarter (Sum of Items 27a through 47a).....	549	0 ⁵⁵⁰	0 ⁵⁵¹	0 ⁵⁵²	0
49. ABAWDs that participated in a non-qualifying CalFresh E&T component by month during the quarter (Count of Item 27c).....	553	0 ⁵⁵⁴	0 ⁵⁵⁵	0 ⁵⁵⁶	0
50. CalFresh E&T participants who are not ABAWDs in a component by month during the quarter (Sum of Items 27b through 47b plus the count of item 49).....	557	0 ⁵⁵⁸	0 ⁵⁵⁹	0 ⁵⁶⁰	0

Figure 2.1.2.14 – STAT 47 Summary Sheet PART E After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS (All Counties)		October 1	
The review period for Items 28 and 29 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.			
28. Work registrants on October 1.....	269		0
29. ABAWDs on October 1 (Include in Item 28).....	270		0

Figure 2.1.2.15 – STAT 47 Summary Sheet PART F Before Changes

PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS		October 1	
The review period for Items 51, 52 and 53 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.			
51. Work registrants on October 1.....	561		0
52. ABAWDs on October 1 (Include total ABAWD count in cell 561).....	562		0
53. CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only).....	563		0

Figure 2.1.2.16 – STAT 47 Summary Sheet PART F After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

COMMENTS:			
REVISED REPORT EXPLANATION			
ITEMS 13a/13b NEW PARTICIPANTS PLACED IN OTHER COMPONENTS EXPLANATION (Complete if Cells 121-132 are not all zero)			
ITEMS 23a/23b PERSONS PARTICIPATING IN OTHER COMPONENTS EXPLANATION (Complete if Cells 241-252 are not all zero)			
CONTACT PERSON	TELEPHONE	EXTENSION	FAX
JOB TITLE/CLASSIFICATION	E-MAIL	DATE SUBMITTED	

Figure 2.1.2.17 – STAT 47 Summary Sheet Comment Section Before Changes

COMMENTS:			
REVISED REPORT EXPLANATION			
CONTACT PERSON	TELEPHONE	EXTENSION	FAX
JOB TITLE/CLASSIFICATION	E-MAIL		
SUPERVISOR	TELEPHONE	EXTENSION	FAX
JOB TITLE/CLASSIFICATION	E-MAIL		
			DATE SUBMITTED

Figure 2.1.2.18 – STAT 47 Summary Sheet Comment Section After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

CalSAWS		STAT 47					
San Bernardino							
Run Date: OCT-02-23 09:10 PM							
Quarter: Jul. - Sep.							
PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 ABAWDs exempt under the 15% criteria during the quarter							
	Part A totals:	Month 1	Month 2	Month 3	Total		
	Line 3 – ABAWDs	0	0	0	0		Total
					Work Registration		
Month	ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type
-	-	-	-	-	-	-	-

Figure 2.1.2.19 – STAT 47 PART A Line 3 Sheet Before Changes

CalSAWS		STAT 47					
San Bernardino							
Run Date: JAN-28-24 05:01 PM							
Quarter: Oct. - Dec.							
PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 Total number of discretionary exemptions used during the quarter							
	Part A totals:	Month 1	Month 2	Month 3	Total		
	Line 3 – ABAWDs	0	0	0	0		Total
					Work Registration		
Month	ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type
-	-	-	-	-	-	-	-

Figure 2.1.2.20 – STAT 47 PART A Line 3 Sheet After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

CalSAWS		STAT 47				
San Bernardino						
Run Date: OCT-02-23 09:10 PM						
Quarter: Jul. - Sep.						
PART B. NEW INDIVIDUAL E&T PARTICIPANTS						
	PART B Totals	Month 1	Month 2	Month 3	Total	
	ABAWDs	15	0	0		15
	Non-ABAWDs	13	5	1		19
	Total	28	5	1		34
Line	Activity	Month	ABAWD	Case Number	Case Name	
1	W-16	Jul	X	6100700	WILL HENKINS	

Figure 2.1.2.21 – STAT 47 PART B Sheet Before Changes

CalSAWS		STAT 47			
San Bernardino					
Run Date: JAN-28-24 05:01 PM					
Quarter: Oct. - Dec.					
PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS					
	PART B Totals	Month 1	Month 2	Month 3	Total
	ABAWDs	1	0	0	1
	Non-ABAWDs	1	0	0	1
	Total	2	0	0	2
Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.22 – STAT 47 PART B Sheet After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

CalSAWS		STAT 47			
San Bernardino					
Run Date: OCT-02-23 09:10 PM					
Quarter: Jul. - Sep.					
PART C. NEW E&T COMPONENT PLACEMENTS					
	PART C Totals	Month 1	Month 2	Month 3	Total
	ABAWDs	15	0	0	15
	Non-ABAWDs	13	6	1	20
	Total	28	6	1	35
Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.23 – STAT 47 PART C Sheet Before Changes

CalSAWS		STAT 47			
San Bernardino					
Run Date: JAN-28-24 05:01 PM					
Quarter: Oct. - Dec.					
PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS					
	PART C Totals	Month 1	Month 2	Month 3	Total
	ABAWDs	1	0	0	1
	Non-ABAWDs	1	0	0	1
	Total	2	0	0	2
Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.24 – STAT 47 PART C Sheet After Changes

Note: See the STAT 47 mockup in the Supporting Documents section for the full template

2.1.3 Description of Change

1. Update the STAT 47 state report template to adhere to standards per ACL 22-67E
 - a. Remove the word 'Non-Assistance' from the title in the template
 - i. Title before: 'Non-Assistance CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and

Employment and Training (E&T) Program Quarterly
Statistical Report STAT 47'

- ii. Title after: 'CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report STAT 47'
- b. Rename item 3 in 'PART A: WORK REGISTRANT AND ABAWD INFORMATION (All Counties)'
 - i. Item 3 before: 'ABAWDs exempt under the 15% criteria during the quarter'
 - ii. Item 3 after: 'Total number of discretionary exemptions used during the quarter'
- c. Rename the PART B. title
 - i. Title before: 'PART B: NEW INDIVIDUAL E&T PARTICIPANTS (E&T Counties Only) Count each participant in only one month during FFY.'
 - ii. Title after: 'PART B: NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in only one month during FFY.'
- d. Rename item 4 in 'PART B: NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only)'
 - i. Item 4 before: 'New individuals who participated in E&T during the quarter (Items 4a plus 4b)'
 - ii. Item 4 after: 'New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter (Items 4a plus 4b)'
- e. Rename the PART C. title
 - i. Title before: 'PART C: NEW E&T COMPONENT PLACEMENTS (E&T Counties Only) For each component placement, count the participants in only one month during FFY.'
 - ii. Title after: 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.'
- f. Rename item 7 in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only)'
 - i. Item 7 before: 'New workfare participants placed during the quarter (Items 7a plus 7b)'
 - ii. Item 7 after: 'New Workfare (W) participants placed during the quarter (Items 7a plus 7b)'
- g. Rename item 12 and change its item number to item 9 in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only)'
 - i. Item 12 before: 'New job retention participants placed during the quarter (Items 12a plus 12 b)'
 - ii. Item 9 after: 'New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b)'

- h. Remove the following items in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only)'
 - i. Item 5: New job search participants placed during the quarter (Items 5a plus 5b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - ii. Item 6: New job club participants placed during the quarter (Items 6a plus 6b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - iii. Item 8: New self-initiated workfare participants placed during the quarter (Items 8a plus 8b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - iv. Item 9: New work experience (on-the-job training OJT) participants placed during the quarter (Items 9a plus 9b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - v. Item 10: New vocational training participants placed during the quarter (Items 10a plus 10b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - vi. Item 11: New education participants placed during the quarter (Items 11a plus 11b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - vii. Item 13: New participants placed in other components offered by the county during the quarter (Items 13a plus 13b)
 - 1. Item a: ABAWD placements (List components in Item 13a/13b explanation box)
 - 2. Item b: Non-ABAWD placements (List components in Item 13a/13b explanation box)
 - viii. Item 14: Total of new unduplicated placements in all component categories during the quarter (Items 14a plus 14b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- i. Add the following items to 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only)'
 - i. Item 5: New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - ii. Item 6: New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c)
 - 1. Item a: ABAWD in qualifying component placements (WIOA and Veterans Programs)

2. Item b: Non-ABAWD placements
3. Item c: ABAWD in non-qualifying component placements
- iii. Item 8: New Self-Employment Training (SET) participants placed during the quarter (Items 8a plus 8b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- iv. Add a section header titled 'Education Components'
- v. Item 10: New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- vi. Item 11: New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- vii. Item 12: New Education Program English Language (EPEL) participants placed during the quarter (includes ESL and ELL) (Items 12a plus 12b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- viii. Item 13: New Education Program Integrated (EPI) participants placed during the quarter (includes Bridge Programs) (Items 13a plus 13b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- ix. Item 14: New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- x. Add a section header titled 'Work Experience Components'
- xi. Item 15: New Work Activity (WA) participants placed during the quarter (Items 15a plus 15b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- xii. Item 16: New Work-Based Learning Internship (WBLI) participants placed during the quarter (Items 16a plus 16b)
 1. Item a: ABAWD placements
 2. Item b: Non-ABAWD placements
- xiii. Item 17: New Work-Based Learning Internship Subsidized (WBLI-SUB) participants placed during the quarter (Items 17a plus 17b)
 1. Item a: ABAWD placements

- 2. Item b: Non-ABAWD placements
- xiv. Item 18: New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xv. Item 19: New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xvi. Item 20: New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xvii. Item 21: New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xviii. Item 22: New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xix. Item 23: New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xx. Item 24: New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xxi. Item 25: New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xxii. Item 26: New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- j. Rename the PART D. title

- i. Title before: 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (E&T Counties Only) Count each participant in each applicable month each quarter.'
 - ii. Title after: PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'
- k. Rename item 17 and change item number to item 28 in 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'
 - i. Item 17 before: 'Workfare participants by month during the quarter (Items 17a plus 17b)'
 - ii. Item 28 after: 'Workfare (W) participants by month during the quarter (Items 28a plus 28b)'
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- l. Rename item 22 and change item number to item 30 in 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'
 - i. Item 22 before: 'Job retention participants by month during the quarter (Items 22a plus 22b)'
 - ii. Item 30 after: 'Job Retention (JR) participants by month during the quarter (Items 30a plus 30b)'
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- m. Remove the following items in 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'
 - i. Item 15: Job search participants by month during the quarter (Items 15a plus 15b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - ii. Item 16: Job club participants by month during the quarter (Items 16a plus 16b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - iii. Item 18: Self-initiated workfare participants by month during the quarter (Items 18a plus 18b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - iv. Item 19: Work experience (OJT) participants by month during the quarter (Items 19a plus 19b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - v. Item 20: Vocational training participants by month during the quarter (Items 20a plus 20b)
 - 1. Item a: ABAWD placements

- 2. Item b: Non-ABAWD placements
- vi. Item 21: Education participants by month during the quarter (Items 21a plus 21b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- vii. Item 23: Participants in other components offered by the county by month during the quarter (Items 23a plus 23b)
 - 1. Item a: ABAWD placements (List components in Item 23a/23b explanation box)
 - 2. Item b: Non-ABAWD placements (List components in Item 23a/23b explanation box)
- n. Add the following items to 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'
 - i. Item 27: Supervised Job Search (SJS) participants by month during the quarter (Items 27a plus 27b plus 27c)
 - 1. Item a: ABAWD in qualifying component placements (WIOA and Veterans Programs)
 - 2. Item b: Non-ABAWD placements
 - 3. Item c: ABAWD in non-qualifying component placements
 - ii. Item 29: Self-Employment Training (SET) participants by month during the quarter (Items 29a plus 29b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - iii. Add a section header titled 'Education Components'
 - iv. Item 31: Education Program Basic (EPB) participants placed by month during the quarter (includes ABE, HSD and GED) (Items 31a plus 31b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - v. Item 32: Education Program Career (EPC) participants by month during the quarter (includes CTE and Vocational training) (Items 32a plus 32b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - vi. Item 33: Education Program English Language (EPEL) participants by month during the quarter (includes ESL and ELL) (Items 33a plus 33b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
 - vii. Item 34: Education Program Integrated (EPI) participants by month during the quarter (includes Bridge Programs) (Items 34a plus 34b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements

- viii. Item 35: Education Program Work Readiness Training (EPWRT) participants by month during the quarter (Items 35a plus 35b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- ix. Add a section header titled 'Work Experience Components'
- x. Item 36: Work Activity (WA) participants by month during the quarter (Items 36a plus 36b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xi. Item 37: Work-Based Learning Internship (WBLI) participants by month during the quarter (Items 37a plus 37b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xii. Item 38: Work-Based Learning Internship Subsidized (WBLI-SUB) participants by month during the quarter (Items 38a plus 38b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xiii. Item 39: Work-Based Learning On-the-Job Training (WBLOJT) participants by month during the quarter (Items 39a plus 39b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xiv. Item 40: Work-Based Learning Pre-apprenticeship (WBLPA) participants by month during the quarter (Items 40a plus 40b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xv. Item 41: Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants by month during the quarter (Items 41a plus 41b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xvi. Item 42: Work-Based Learning Apprenticeship (WBLA) participants by month during the quarter (Items 42a plus 42b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xvii. Item 43: Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants by month during the quarter (Items 43a plus 43b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements

- xviii. Item 44: Work-Based Learning Transitional Jobs (WBLTJ) participants by month during the quarter (Items 44a plus 44b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xix. Item 45: Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants by month during the quarter (Items 45a plus 45b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xx. Item 46: Work-Based Learning Other (WBLO) participants by month during the quarter (Items 46a plus 46b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- xxi. Item 47: Work-Based Learning Other Subsidized (WBLO-SUB) participants by month during the quarter (Items 47a plus 47b)
 - 1. Item a: ABAWD placements
 - 2. Item b: Non-ABAWD placements
- o. Rename item 24 and change its item number to item 48 in 'PART E. E&T TOTALS FOR THE FNS 583'
 - i. Item 24 before: 'ABAWDs that participated in a qualifying E&T component by month during the quarter (Sum of Items 17a through 23a)'
 - ii. Item 48 after: 'ABAWDs that participated in a qualifying CalFresh E&T component by month during the quarter (Sum of Items 27a through 47a)'
- p. Rename item 25 and change its item number to item 49 in 'PART E. E&T TOTALS FOR THE FNS 583'
 - i. Item 25 before: 'ABAWDs that participated in a non-qualifying E&T component by month during the quarter (Sum of Items 15a through 16a)'
 - ii. Item 49 after: 'ABAWDs that participated in a non-qualifying CalFresh E&T component by month during the quarter (Count of Item 27c)'
- q. Remove the following items in 'PART E. E&T TOTALS FOR THE FNS 583'
 - i. Item 26: Non-ABAWDs that participated in an E&T component by month during the quarter (Sum of Items 15b plus 23b)
 - ii. Item 27: 'E&T participants who are not ABAWDs in qualifying components by month during the quarter (Items 25 plus 26)
- r. Add the following item in 'PART E. E&T TOTALS FOR THE FNS 583'
 - i. Item 50: 'CalFresh E&T participants who are not ABAWDs in a component by month during the quarter (Sum of Items 27b through 47b plus the count of item 49)'
- s. Rename the PART F. title

- i. Title before: 'PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS (All Counties) The review period for Items 28 and 29 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.'
 - ii. Title after: 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS The review period for Items 51, 52 and 53 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.'
- t. Change item 28 'Work registrants on October 1' to be item 51 in 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS'
- u. Rename item 29 and change to item 52 in 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS'
 - i. Item 29 before: 'ABAWDs on October 1 (Include in Item 28)'
 - ii. Item 52 after: 'ABAWDs on October 1 (Include total ABAWD count in cell 561)'
- v. Add the following item to 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS'
 - i. Item 53: 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only)'
- w. Remove the following lines from the explanation notes section of the template:
 - i. 'ITEMS 13a/13b NEW PARTICIPANTS PLACED IN OTHER COMPONENTS EXPLANATION (Complete if Cells 121-132 are not all zero)'
 - ii. 'ITEMS 23a/23b PERSONS PARTICIPATING IN OTHER COMPONENTS EXPLANATION (Complete if Cells 241-252 are not all zero)'
- x. Revise the contact information section of the template to include an entry for Supervisor information
- y. Update the cell numbering on the 'Summary' sheet to adhere to the cell numbering in the mockup 'Summary' sheet found in the Supporting Documents section
 - i. The cell shading shall adhere to the cell shading in the report mockup 'Summary' sheet
- z. The hyperlinks on the 'Summary' sheet for newly added items in sections 'PART C' and 'PART D' will continue to link to the corresponding 'PART C' and 'PART D' detail sheets. See the report mockup in the Supporting Documents section for 'Summary' sheet to corresponding detail sheet hyper linkage.
- aa. Update sheet titles in the following detail sheets
 - i. Part A Line 3

1. Sheet title before: 'PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 ABAWDs exempt under the 15% criteria during the quarter'
 2. Sheet title after: 'PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 Total number of discretionary exemptions used during the quarter'
- ii. Part B
 1. Sheet title before: 'PART B. NEW INDIVIDUAL E&T PARTICIPANTS'
 2. Sheet title after: 'PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS'
- iii. Part C
 1. Sheet title before: 'PART C. NEW E&T COMPONENT PLACEMENTS'
 2. Sheet title after: 'PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS'
2. Update the STAT 47 state report logic to remove the restriction to those individuals that are Non-Assistance CalFresh (NACF) only.
 - a. The entire report logic will remove the condition that filters for Non-Assistance CalFresh (NACF) individuals only.
 - b. The base population will now count all CalFresh individuals regardless if they are Non-Assistance CalFresh (NACF) or Public-Assistance (PACF).

Tech Note: The STAT 47 PySpark logic currently identifies those as being NACF through the following logic and shall be removed:

- AC.PUBLIC_ASSIST_IND = 'N'
 - This is looking at the PUBLIC_ASSIST_IND from the AID_CODE table.
 - NA_PA = 'NA'
 - NA_PA is a manually created column in the logic used to distinguish those who are CalFresh without CalWORKs individuals (NACF) versus those who are CalFresh with CalWORKs individuals (PACF).
3. Update the STAT 47 state report logic to account for the removal of current CalFresh E&T components and addition of new CalFresh E&T components per ACL 22-67 and ACL 22-67E. The mapping of customer components/activities for the CFET and GROW programs will be updated in respect to SCRs CA-230837 (CFET components) and CA-254559 (GROW activities).
 - a. CFET components which are to be removed and no longer countable on the STAT 47
 - i. Education
 - ii. Job Club
 - iii. Job Search
 - iv. Self-Initiated Workfare
 - v. Vocational Training
 - vi. Work Experience

Note: Work Experience and Education will be removed as standalone components but will be expanded into various subcomponents listed and described later in this design.

- b. CFET components remaining as countable on the STAT 47
 - i. Job Retention
 - ii. Workfare
- c. New CFET components being added and to be countable on the STAT 47
 - i. EDU Prog. Basic (EPB)
 - ii. EDU Prog. Career (EPC)
 - iii. EDU Prog. English Language (EPEL)
 - iv. EDU Prog. Integrated (EPI)
 - v. EDU Prog. Work Readiness Training (EPWRT)
 - vi. Orientation/Assessment (OA)
 - vii. Self-Employment Training (SET)
 - viii. Supv. Job Search (Non-Qualifying)
 - ix. Supv. Job Search (WIOA and Veterans)
 - x. Work Activity (WA)
 - xi. WBL Internship (WBLI)
 - xii. WBL Internship Subs. (WBLI-SUB)
 - xiii. WBL On-the-Job Training (WBLOJT)
 - xiv. WBL Other (WBLO)
 - xv. WBL Other Subs. (WBLO-SUB)
 - xvi. WBL Pre-apprenticeship (WBLPA)
 - xvii. WBL Pre-apprenticeship Subs. (WBLPA-SUB)
 - xviii. WBL Apprenticeship (WBLA)
 - xix. WBL Apprenticeship Subs. (WBLA-SUB)
 - xx. WBL Transitional Jobs (WBLTJ)
 - xxi. WBL Transitional Jobs Subs. (WBLTJ-SUB)
- d. GROW activities which are to be removed and no longer countable towards a CFET component on the STAT 47
 - i. Non-Custodial Parent
 - ii. Post Employment Services
 - iii. Youth
- e. GROW activities remaining and being remapped to a new CFET component on the STAT 47
 - i. Career Opportunities Resources & Employment
 - ii. Computer Application Class
 - iii. Education & Training
 - iv. GED
 - v. Intensive Case Management
 - vi. Job Fair
 - vii. Job Readiness Training
 - viii. Job Readiness Training for Youth
 - ix. Literacy
 - x. Office Occupations
 - xi. One-Stop

- xii. Pathways to Success
- xiii. Security Office Training
- xiv. Self-Initiated Program
- xv. Short-Term Training
- f. New GROW activities to be mapped to a CFET component on the STAT 47
 - i. Activity #1 - EDU
 - ii. Activity #2 - EDU
 - iii. Activity #3 - EDU
 - iv. Activity #4- WEP
 - v. Activity #5- WEP
 - vi. Activity #6- WEP
 - vii. Activity #7-WEP
 - viii. Activity #8-SJS
 - ix. Activity #9-SJS
 - x. Activity #10- SET
 - xi. Apprenticeship
 - xii. Assessment
 - xiii. Career Exploration Month #1
 - xiv. Career Exploration Month #2
 - xv. Career Exploration Month #3
 - xvi. Careers for a Cause (C4C)
 - xvii. CFET Retention Services
 - xviii. Community College
 - xix. Entrepreneurship
 - xx. Financial Literacy
 - xxi. GROW Transition-Age Youth Employment Program (GTEP)
 - xxii. GROW Youth Employment Program (GYEP)
 - xxiii. License/Certificate/Exam (LCE)
 - xxiv. Life Skills
 - xxv. Ready, Set, START!
 - xxvi. RightWay
 - xxvii. START Connect
 - xxviii. START Learning
 - xxix. START ORIENTATION
 - xxx. Subsidized Employment
 - xxxi. TAYPortunity Program
 - xxxii. TAYPortunity Transitional Subsidized Employment
 - xxxiii. Unsubsidized Employment
 - xxxiv. Vocational Assessment
 - xxxv. Workfare
- g. Logic updates to items in 'PART B: NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only)'
 - i. Item 4 'New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter'

Note: GROW activities are currently not counted in the item 4 population

1. Remove the following components/activities from being counted in the population for item 4
 - a. Education
 - b. Job Club
 - c. Job Search
 - d. Self-Initiated Workfare
 - e. Vocational Training
 - f. Work Experience
2. Add the following components/activities to be counted in the population for item 4
 - 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. The following components/activities will remain as countable in the population for item 4
 - a. Job Retention
 - b. Workfare
- h. Logic updates to items in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.' and 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'

Note:

- The PART C and PART D existing base logic will remain in place, what is changing in these sections is the components/activities that are counted in the base population.

- See section **5.1 Component/Activity to CFET Component Mapping** in the **Appendix** for the complete mapping of components/activities to CFET Components.
- **Bolded** activities indicate a **GROW activity**
 - i. Item 5 'New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b)'
 - 1. (5a) This population will count new ABAWD participants with a component/activity type of 'Orientation/Assessment (OA)', '**START ORIENTATION**' or '**Assessment**'
 - 2. (5b) This population will count new non-ABAWD participants with a component/activity type of 'Orientation/Assessment (OA)', '**START ORIENTATION**' or '**Assessment**'
 - 3. Items 5a plus 5b will sum up to item 5
 - ii. Item 6 'New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c)' and Item 27 'Supervised Job Search (SJS) participants by month during the quarter (Items 27a plus 27b plus 27c)'
 - 1. (a) 'ABAWD in qualifying component placements (WIOA and Veterans Programs)'
 - a. This population will count ABAWD participants with a component/activity type of 'Supv. Job Search (WIOA and Veterans)' or '**One-Stop**'
 - 2. (b) 'Non-ABAWD placements'
 - a. This population will count Non-ABAWD participants with a component/activity type of 'Supv. Job Search (Non-Qualifying)', '**One-Stop**', '**Activity #8-SJS**', '**Activity #9-SJS**', '**Career Exploration Month #1**', '**Career Exploration Month #2**', '**Career Exploration Month #3**', '**Career Opportunities Resources & Employment**', '**Intensive Case Management**', '**Job Fair**', '**Job Readiness Training**', '**Job Readiness Training for Youth**', '**Pathways to Success**', or '**RightWay**'
 - 3. (c) 'ABAWD in non-qualifying component placements'
 - a. This population will count ABAWD participants with a component/activity type of 'Supv. Job Search (Non-Qualifying)', '**Activity #8-SJS**', '**Activity #9-SJS**', '**Career Exploration Month #1**', '**Career Exploration Month #2**', '**Career Exploration Month #3**', '**Career Opportunities Resources & Employment**', '**Intensive Case**

Management', 'Job Fair', 'Job Readiness Training', 'Job Readiness Training for Youth', 'Pathways to Success', or 'RightWay'

4. Items 6a plus 6b plus 6c will sum up to item 6 and items 27a plus 27b plus 27c will sum up to item 27
- iii. Item 7 'New Workfare (W) participants placed during the quarter (Items 7a plus 7b)' and Item 28 'Workfare (W) participants by month during the quarter (Items 28a plus 28b)'
 1. (a) These items will continue to count ABAWD participants with the existing component/activity type of 'Workfare'
 2. (b) These items will continue to count non-ABAWD participants with the existing component/activity type of 'Workfare'
 3. Items 7a plus 7b will sum up to item 7 and items 28a and 28b will sum up to item 28.
 4. The Workfare component/activity will belong to both the GROW and CFET service categories on the 'Select Activity' page and will be distinguished by the program the component/activity is assigned under, CFET or GROW. In the scenario the customer has a Workfare component/activity for both CFET and GROW, the report will pick the latest component/activity the customer was placed in for the quarter. This will prevent double counting the Workfare component/activity for both the CFET and GROW programs.

Tech Note: The latest Workfare component/activity will be chosen by taking the activity with the most recent Begin Date (CUST_ACTIV.BEG_DATE)

- iv. Item 8 'New Self-Employment Training (SET) participants placed during the quarter (Items 8a plus 8b)' and Item 29 'Self-Employment Training (SET) participants by month during the quarter (Items 29a plus 29b)'
 1. (a) These populations will count ABAWD participants with a component/activity type of 'Self-Employment Training (SET)', '**Activity #10- SET**', or '**Entrepreneurship**'
 2. (b) These populations will count non-ABAWD participants with a component/activity type of 'Self-Employment Training (SET)', '**Activity #10- SET**', or '**Entrepreneurship**'
 3. Items 8a plus 8b will sum up to item 8 and items 29a and 29b will sum up to item 29.

- v. Item 9 'New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b)' and Item 30 'Job Retention (JR) participants by month during the quarter (Items 30a plus 30b)'
 - 1. (a) These items will continue to count ABAWD participants with the existing component/activity type of 'Job Retention' and will additionally count **'CFET Retention Services'**
 - 2. (b) These items will continue to count non-ABAWD participants with the existing component/activity type of 'Job Retention' and will additionally count **'CFET Retention Services'**
 - 3. Items 9a plus 9b will sum up to item 9 and items 30a and 30b will sum up to item 30.
- vi. Item 10 'New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b)' and Item 31 'Education Program Basic (EPB) participants by month during the quarter (includes ABE, HSD and GED) (Items 31a plus 31b)'

Note: User should select the 'EDU Prog. Basic (EPB)' component if the participant is in ABE, HSD and GED, in order to be counted towards the Education Program Basic (EPB) CFET component on the STAT 47.

 - 1. (a) These populations will count ABAWD participants with a component/activity type of 'EDU Prog. Basic (EPB)', **'Financial Literacy'**, **'Ready, Set, START!'**, **'Life Skills'** or **'Literacy'**
 - 2. (b) These populations will count non-ABAWD participants with a component/activity type of 'EDU Prog. Basic (EPB)', **'Financial Literacy'**, **'Ready, Set, START!'**, **'Life Skills'** or **'Literacy'**
 - 3. Items 10a plus 10b will sum up to item 10 and items 31a and 31b will sum up to item 31.
- vii. Item 11 'New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b)' and Item 32 'Education Program Career (EPC) participants by month during the quarter (includes CTE and Vocational training) (Items 32a plus 32b)'

Note: User should select the 'EDU Prog. Career (EPC)' component if the participant is in CTE and Vocational Training, in order to be counted towards the Education Program Career (EPC) CFET component on the STAT 47.

 - 1. (a) These populations will count ABAWD participants with a component/activity type of 'EDU Prog. Career (EPC)', **'Activity #1 – EDU'**, **'Activity #2 – EDU'**, **'Activity #3 – EDU'**, **'Careers for a Cause (C4C)'**, **'Community College'**,

2. (b) These populations will count non-ABAWD participants with a component type of 'EDU Prog. Integrated (EPI)'
3. Items 13a plus 13b will sum up to item 13 and items 34a and 34b will sum up to item 34.
- x. Item 14 'New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b)' and Item 35 'Education Program Work Readiness Training (EPWRT) participants by month during the quarter (Items 35a plus 35b)'
 1. (a) These populations will count ABAWD participants with a component/activity type of 'EDU Prog. Work Readiness Training (EPWRT)', **'START Learning', 'RightWay' or 'Education & Training'**
 2. (b) These populations will count non-ABAWD participants with a component/activity type of 'EDU Prog. Work Readiness Training (EPWRT)', **'START Learning', 'RightWay' or 'Education & Training'**
 3. Items 14a plus 14b will sum up to item 14 and items 35a and 35b will sum up to item 35.
- xi. Item 15 'New Work Activity (WA) participants placed during the quarter (Items 15a plus 15b)' and Item 36 'Work Activity (WA) participants by month during the quarter (Items 36a plus 36b)'
 1. (a) These populations will count ABAWD participants with a component type of 'Work Activity (WA)'
 2. (b) These populations will count non-ABAWD participants with a component type of 'Work Activity (WA)'
 3. Items 15a plus 15b will sum up to item 15 and items 36a plus 36b will sum up to item 36.
- xii. Item 16 'New Work-Based Learning Internship (WBLI) participants placed during the quarter (Items 16a plus 16b)' and Item 37 'Work-Based Learning Internship (WBLI) participants by month during the quarter (Items 37a plus 37b)'
 1. (a) These populations will count ABAWD participants with a component type of 'WBL Internship (WBLI)'
 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Internship (WBLI)'
 3. Items 16a plus 16b will sum up to item 16 and items 37a and 37b will sum up to item 37.

- xiii. Item 17 'New Work-Based Learning Internship Subsidized (WBLI-SUB) participants placed during the quarter (Items 17a plus 17b)' and Item 38 'Work-Based Learning Internship Subsidized (WBLI-SUB) participants by month during the quarter (Items 38a plus 38b)'
 - 1. (a) These populations will count ABAWD participants with a component type of 'WBL Internship Subs. (WBLI-SUB)'
 - 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Internship Subs. (WBLI-SUB)'
 - 3. Items 17a plus 17b will sum up to item 17 and items 38a plus 38b will sum up to item 38.
- xiv. Item 18 'New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b)' and Item 39 'Work-Based Learning On-the-Job Training (WBLOJT) participants by month during the quarter (Items 39a plus 39b)'
 - 1. (a) These populations will count ABAWD participants with a component type of 'WBL On-the-Job Training (WBLOJT)'
 - 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL On-the-Job Training (WBLOJT)'
 - 3. Items 18a plus 18b will sum up to item 18 and items 39a plus 39b will sum up to item 39.
- xv. Item 19 'New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b)' and Item 40 'Work-Based Learning Pre-apprenticeship (WBLPA) participants by month during the quarter (Items 40a plus 40b)'
 - 1. (a) These populations will count ABAWD participants with a component type of 'WBL Pre-apprenticeship (WBLPA)'
 - 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Pre-apprenticeship (WBLPA)'
 - 3. Items 19a plus 19b will sum up to item 19 and items 40a plus 40b will sum up to item 40.
- xvi. Item 20 'New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b)' and Item 41 'Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants by month during the quarter (Items 41a plus 41b)'
 - 1. (a) These populations will count ABAWD participants with a component type of 'WBL Pre-apprenticeship Subs. (WBLPA-SUB)'

2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Pre-apprenticeship Subs. (WBLPA-SUB)'
 3. Items 20a plus 20b will sum up to item 20 and items 41a and 41b will sum up to item 41.
- xvii. Item 21 'New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b)' and Item 42 'Work-Based Learning Apprenticeship (WBLA) participants by month during the quarter (Items 42a plus 42b)'
1. (a) These populations will count ABAWD participants with a component type of 'WBL Apprenticeship (WBLA)'
 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Apprenticeship (WBLA)'
 3. Items 21a plus 21b will sum up to item 21 and items 42a and 42b will sum up to item 42.
- xviii. Item 22 'New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b)' and Item 43 'Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants by month during the quarter (Items 43a plus 43b)'
1. (a) These populations will count ABAWD participants with a component/activity type of 'WBL Apprenticeship Subs. (WBLA-SUB)', or **'Apprenticeship'**
 2. (b) These populations will count non-ABAWD participants with a component/activity type of 'WBL Apprenticeship Subs. (WBLA-SUB)', or **'Apprenticeship'**
 3. Items 22a plus 22b will sum up to item 22 and items 43a plus 43b will sum up to item 43.
- xix. Item 23 'New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b)' and Item 44 'Work-Based Learning Transitional Jobs (WBLTJ) participants by month during the quarter (Items 44a plus 44b)'
1. (a) These populations will count ABAWD participants with a component/activity type of 'WBL Transitional Jobs (WBLTJ)', or **'Unsubsidized Employment'**
 2. (b) These populations will count non-ABAWD participants with a component/activity type of 'WBL Transitional Jobs (WBLTJ)', or **'Unsubsidized Employment'**

3. Items 23a plus 23b will sum up to item 23 and items 44a plus 44b will sum up to item 44.
- xx. Item 24 'New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b)' and Item 45 'Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants by month during the quarter (Items 45a plus 45b)'
1. (a) These populations will count ABAWD participants with a component/activity type of 'WBL Transitional Jobs Subs. (WBLTJ-SUB)', **'Activity #4- WEP', 'Activity #5- WEP', 'Activity #6- WEP', 'Activity #7-WEP', 'Subsidized Employment', 'TAYPortunity Program', 'TAYPortunity Transitional Subsidized Employment', 'GROW Transition-Age Youth Employment Program (GTEP)', 'GROW Youth Employment Program (GYEP)', or 'One-Stop'**
 2. (b) These populations will count non-ABAWD participants with a component/activity type of 'WBL Transitional Jobs Subs. (WBLTJ-SUB)', **'Activity #4- WEP', 'Activity #5- WEP', 'Activity #6- WEP', 'Activity #7-WEP', 'Subsidized Employment', 'TAYPortunity Program', 'TAYPortunity Transitional Subsidized Employment', 'GROW Transition-Age Youth Employment Program (GTEP)', 'GROW Youth Employment Program (GYEP)', or 'One-Stop'**
 3. Items 24a plus 24b will sum up to item 24 and items 45a plus 45b will sum up to item 45.
- xxi. Item 25 'New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b)' and Item 46 'Work-Based Learning Other (WBLO) participants by month during the quarter (Items 46a plus 46b)'
1. (a) These populations will count ABAWD participants with a component type of 'WBL Other (WBLO)'
 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Other (WBLO)'
 3. Items 25a plus 25b will sum up to item 25 and items 46a plus 46b will sum up to item 46.
- xxii. Item 26 'New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b)' and Item 47 'Work-Based Learning Other Subsidized (WBLO-SUB) participants by month during the quarter (Items 47a plus 47b)'

1. (a) These populations will count ABAWD participants with a component type of 'WBL Other Subs. (WBLO-SUB)'
 2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Other Subs. (WBLO-SUB)'
 3. Items 26a plus 26b will sum up to item 26 and items 47a plus 47b will sum up to item 47.
- i. Update detail sheets 'Part C' and 'Part D' 'Line' column mapping to account for the removal and addition of CFET components
 - i. See change **2.1.3.2.e** for the component/activities mapped to each item number. The item number will provide the 'Line' column value which is to be displayed for the respective component/activity.
 1. Using change **2.1.3.2.e.iv** as an example, possible 'Line' column values for component/activities 'Self-Employment Training (SET)', 'Activity #10- SET', or 'Entrepreneurship' would be 'Line 8a' or 'Line 8b' on the 'Part C' detail sheet, or 'Line 29a' or 'Line 29b' on the 'Part D' detail sheet.
 - ii. For 'Part C' detail sheet, possible 'Line' column values will range from item 5a/b – 26a/b
 - iii. For 'Part D' detail sheet, possible 'Line' column values will range from item 27a/b – 47a/b
 - j. Update the population for detail sheets 'Part B', 'Part C' and 'Part D' to include those belonging to the updated CFET components
 - k. Update the logic for section 'PART E. E&T TOTALS FOR THE FNS 583' to account for the removal and addition of CFET components

Note: This section is automatically calculated using the sum of counts from section 'PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only)'

- i. Item 48 'ABAWDs that participated in a qualifying CalFresh E&T component by month during the quarter'
 1. These counts will be updated to take the sum of items 27a through 47a for the respective 'Month 1 (A)', 'Month 2 (B)', 'Month 3 (C)' and 'Quarter Total (D)' columns
- ii. Item 49 'ABAWDs that participated in a non-qualifying CalFresh E&T component by month during the quarter'
 1. These counts will be updated to take the count of item 27c for the respective 'Month 1 (A)', 'Month 2 (B)', 'Month 3 (C)' and 'Quarter Total (D)' columns
- iii. Item 50 'CalFresh E&T Participants who are not ABAWDs in a component by month during the quarter'

1. These counts will be updated to take the sum of items 27b through 47b plus the count of item 49 for the respective 'Month 1 (A)', 'Month 2 (B)', 'Month 3 (C)' and 'Quarter Total (D)' columns
- iv. Item 26 on the prior STAT 47 report template has been removed but this population is captured in what is now item 50 'CalFresh E&T Participants who are not ABAWDs in a component by month during the quarter'
- I. Update the logic for section 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, AND E&T PARTICIPANT COUNTS' to add new item 53
 - i. Item 53: 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only)'
 1. This population will be the count of all CalFresh E&T participants in a CFET component carried forward to October 1 of the reporting period. This entails the participant is a work registrant as of 9/30 and is participating in a component/activity (those components/activities counted towards the CFET components in sections PART C and PART D) that is not ended before 10/01. No individuals counted in sections PART A and PART B shall be counted in item 53 and vice versa.
Tech Note: The begin date (CUST_ACTIV.BEG_DATE) of the component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.

2.1.4 Report Location

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

2.1.5 Counties Impacted

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

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
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N/A	N/A	N/A
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2. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

2.1.7 Report Usage/Performance

No significant performance impact or report usage changes are expected.

2.2 STAT 47 Part F Backup Report

2.2.1 Overview

The STAT 47 Part F Backup Report contains detail information for the formerly named 'PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS (All Counties)' section that provides Work Registrant and ABAWD details carried forward on October 1st. This report will be updated to all for reconciliation with the STAT 47 Part F section after the addition of item 53 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties only)'. The section will be renamed to the 'PART F. POINT-IN-TIME WORK REGISTRANT< ABAWD, AND E&T PARTICIPANT COUNTS (All Counties)' and will now also provide E&T participant details carried forward on October 1st in addition to Work Registrant and ABAWD details. The STAT 47 report currently takes the data generated in the STAT 47 Part F Backup Report to populate its 'PART F' section during the January report generation for the October quarter.

2.2.2 STAT 47 Part F Backup Report Mockup

CalSAWS STAT 47 Part F Backup Report									
San Bernardino									
Run Date: JAN-28-24 05:01 PM									
Report Year: 2023/2024									
PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS									
	PART F Totals:	Total							
	Line 28. Work registrants on October 1	2							
	Line 29. ABAWDs on October 1	0					Total	2	
				Work Registration			CalFresh		
ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type	Status	Begin Date	End Date
N	0014231	Case Name	Person Name	09/15/2022	Mandatory	CFWR	Active	09/01/2023	-
N	0106188	Case Name	Person Name	02/26/2018	Mandatory	CFWR	Active	11/01/2021	-

Figure 2.2.1 – STAT 47 Part F Backup Report Mockup Before Changes

CalSAWS STAT 47 Part F Backup Report									
San Bernardino									
Run Date: JAN-28-24 05:01 PM									
Report Year: 2023/2024									
PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS									
	PART F Totals:	Total							
	Line 51. Work registrants on October 1	4							
	Line 52. ABAWDs on October 1	1					Total	4	
	Line 53. CalFresh E&T Participants on October 1	0							
				Work Registration			CalFresh		
ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type	Status	Begin Date	End Date
N	0014231	Case Name	Person Name	09/15/2022	Mandatory	CFWR	Active	09/01/2023	-
N	0106188	Case Name	Person Name	02/26/2018	Mandatory	CFWR	Active	11/01/2021	-
N	0288258	Case Name	Person Name	04/01/2023	Mandatory	CFWR	Active	10/01/2023	-
Y	0305560	Case Name	Person Name	01/01/2023	Mandatory	CFWR	Active	11/01/2021	-

Figure 2.2.2 – STAT 47 Part F Backup Report Mockup After Changes

2.2.3 Description of Change

1. Update the STAT 47 Part F Backup report to add new Totals information for new item 53 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only) being added to the STAT 47.
 - a. The Part F population will automatically include those that are CalFresh E&T participants on October 1 of the reporting period as this is a subset of item 51 'Work registrants on October 1'
 - i. This population is the count of all CalFresh E&T participants in a CFET component carried forward to October 1 of the reporting period. This entails the participant is a work registrant as of 9/30 and is participating in a component/activity (those components/activities counted towards the CFET components in sections PART C and PART D) that is not ended before 10/01. No individuals counted in sections

PART A and PART B shall be counted in item 53 and vice versa.

Tech Note:

- The begin date (CUST_ACTIV.BEG_DATE) of the component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.
- The STAT 47 and STAT 47 Part F Backup Report share the same PySpark report code for Part F information. The 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS' information shall reconcile between the STAT 47 and STAT 47 Part F Backup Report. The STAT 47 report currently takes the data generated in the STAT 47 Part F Backup Report to populate its 'PART F' section during the January report generation for the October quarter.

- b. Update the title of the detail sheet to match what is in the STAT 47
 - i. Title name before: 'PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS'
 - ii. Title name after: 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS'
- c. Update the 'PART F Totals:' section to rename field totals
 - i. Total field before: 'Line 28. Work registrants on October 1'
 - ii. Total field after: 'Line 51. Work registrants on October 1'
 - iii. Total field before: 'Line 29. ABAWDs on October 1'
 - iv. Total field after: 'Line 52. ABAWDs on October 1'
- d. Update the 'PART F Totals:' section to include a new total field for item 53 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only)'
 - i.

Total Field	Total Field Description
Line 53. CalFresh E&T Participants on October 1	This population is the count of all CalFresh E&T participants in a CFET component carried forward to October 1 of the reporting period. This entails the participant is a work registrant as of 9/30 and is participating in a component/activity (those components/activities counted towards the CFET components

	<p>in sections PART C and PART D) that is not ended before 10/01. No individuals counted in sections PART A and PART B shall be counted in item 53 and vice versa. This is equal to the count for item 53, cell 563 on the STAT 47.</p> <p>Tech Note:</p> <p>The begin date (CUST_ACTIV.BEG_DATE) of the component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.</p>
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- ii. This total field will go below the total for 'Line 52. ABAWDs on October 1'

2.2.4 Report Location

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

2.2.5 Counties Impacted

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

2.2.6 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
N/A	N/A	N/A



4. Security Groups

Security Group	Group Description	Group to Role Mapping
N/A	N/A	N/A

2.2.7 Report Usage/Performance

No significant performance impact or report usage is expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	STAT 47 Mockup	 STAT 47 Mockup.xlsx
2	Reports	STAT 47 Part F Backup Report Mockup	 STAT 47 Part F Backup Report Mocku

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.1.11	The CalSAWS shall support all reports required by federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures, including statistical, operational, workload, and fiscal reports.	The STAT 47 and STAT 47 Part F Backup reports will be updated to adhere to CalFresh E&T Rule policy updates per ACL 22-67 and ACL 22-67E.

4.2 Migration Requirements

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

5.1 Component/Activity to CFET Component Mapping

Component/Activity (Short Decode Value)	CFET Component Listed on STAT 47	New/ Existing Component	Line Item
CFET Components			
Orientation/Assessment (OA) <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'OA' CT 56 	Orientation/Assessment (OA)	New	5
Supv. Job Search (Non-Qualifying) <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'NQF' CT 56 	Supervised Job Search (SJS)	New	6b, 27b, 6c, 27c
Supv. Job Search (WIOA and Veterans) <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'WAV' CT 56 	Supervised Job Search (SJS)	New	6a, 27a
Workfare <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'WF' CT 56 Note: This activity belongs to both the CFET and GROW program. In the scenario the participant has a Workfare activity under both the CFET and GROW programs, to avoid double counting we will take the Workfare activity record with the latest Begin Date (CUST_ACTIV.BEG_DATE)	Workfare (W)	Existing	7, 28
Self-Employment Training (SET) <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'SET' CT 56 	Self-Employment Training (SET)	New	8, 29
Job Retention	Job Retention (JR)	Existing	9, 30

<ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'FR' • CT 56 			
EDU Prog. Basic (EPB) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'EPB' • CT 56 	Education Program Basic (EPB)	New	10, 31
EDU Prog. Career (EPC) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'EPC' • CT 56 	Education Program Career (EPC)	New	11, 32
EDU Prog. English Language (EPEL) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'EPE' • CT 56 	Education Program English Language (EPEL)	New	12, 33
EDU Prog. Integrated (EPI) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'EPI' • CT 56 	Education Program Integrated (EPI)	New	13, 34
EDU Prog. Work Readiness Training (EPWRT) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'EPW' • CT 56 	Education Program Work Readiness Training (EPWRT)	New	14, 35
Work Activity (WA) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WA' • CT 56 	Work Activity (WA)	New	15, 36
WBL Internship (WBLI) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WBL' • CT 56 	Work-Based Learning Internship (WBLI)	New	16, 37
WBL Internship Subs. (WBLI-SUB) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WBI' • CT 56 	Work-Based Learning Internship Subsidized (WBLI-SUB)	New	17, 38
WBL On-the-Job Training (WBLOJT) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WBJ' • CT 56 	Work-Based Learning On-the-Job Training (WBLOJT)	New	18, 39
WBL Pre-apprenticeship (WBLPA) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WBP' • CT 56 	Work-Based Learning Pre-apprenticeship (WBLPA)	New	19, 40
WBL Pre-apprenticeship Subs. (WBLPA-SUB) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WAS' • CT 56 	Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB)	New	20, 41

WBL Apprenticeship (WBLA) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WLA' • CT 56 	Work-Based Learning Apprenticeship (WBLA)	New	21, 42
WBL Apprenticeship Subs. (WBLA-SUB) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WAU' • CT 56 	Work-Based Learning Apprenticeship Subsidized (WBLA-SUB)	New	22, 43
WBL Transitional Jobs (WBLTJ) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WTJ' • CT 56 	Work-Based Learning Transitional Jobs (WBLTJ)	New	23, 44
WBL Transitional Jobs Subs. (WBLTJ-SUB) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WTS' CT 56	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
WBL Other (WBLO) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WBO' • CT 56 	Work-Based Learning Other (WBLO)	New	25, 46
WBL Other Subs. (WBLO-SUB) <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'WBS' • CT 56 	Work-Based Learning Other Subsidized (WBLO-SUB)	New	26, 47
GROW Activities			
Intensive Case Management <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'G12' • CT 56 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Job Fair <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'G15' • CT 56 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
One-Stop <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'G34' • CT 56 	Supervised Job Search (SJS) (WIOA and Veterans)	New	6a, 27a
	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Job Readiness Training <ul style="list-style-type: none"> • CUST_ACTIV.TYPE_CODE = 'G04' 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b,

<ul style="list-style-type: none"> CT 56 			6c, 27c
Job Readiness Training for Youth <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G05' CT 56 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Pathways to Success <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G06' CT 56 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Career Opportunities Resources & Employment <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G07' CT 56 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Education & Training <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G08' CT 56 	Education Program Work Readiness Training (EPWRT)	New	14, 35
Security Office Training <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G30' CT 56 	Education Program Career (EPC)	New	11, 32
Office Occupations <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G32' CT 56 	Education Program Career (EPC)	New	11, 32
Computer Application Class <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G33' CT 56 	Education Program Career (EPC)	New	11, 32
Short-Term Training <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'ST' CT 56 	Education Program Career (EPC)	New	11, 32
GED <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G09' 	Education Program Career (EPC)	New	11, 32

<ul style="list-style-type: none"> CT 56 			
Literacy <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'G10' CT 56 	Education Program Basic (EPB)	New	10, 31
Self-Initiated Program <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'SP' CT 56 	Education Program Career (EPC)	New	11, 32
Activity #1 – EDU <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Career (EPC)	New	11, 32
Activity #2 – EDU <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Career (EPC)	New	11, 32
Activity #3 – EDU <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Career (EPC)	New	11, 32
Activity #4- WEP <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Activity #5- WEP <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Activity #6- WEP <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Activity #7-WEP <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45

Activity #8-SJS <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Activity #9-SJS <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Activity #10- SET Code value to be determined by developer working on SCR CA-254559	Self-Employment Training (SET)	New	8, 29
Apprenticeship <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Apprenticeship Subsidized (WBLA-SUB)	New	22, 43
Assessment <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Orientation/Assessment (OA)	New	5
Career Exploration Month #1 <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Career Exploration Month #2 <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Career Exploration Month #3 <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Careers for a Cause (C4C) <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Career (EPC)	New	11, 32
Community College	Education Program Career (EPC)	New	11, 32

<ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 			
Entrepreneurship <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Self-Employment Training (SET)	New	8, 29
Financial Literacy <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Basic (EPB)	New	10, 31
License/Certificate/Exam (LCE) <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Career (EPC)	New	11, 32
Ready, Set, START! <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Basic (EPB)	New	10, 31
RightWay <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
	Education Program Work Readiness Training (EPWRT)	New	14, 35
START Learning <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Work Readiness Training (EPWRT)	New	14, 35
START ORIENTATION <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Orientation/Assessment (OA)	New	5
Subsidized Employment <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45

Unsubsidized Employment <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs (WBLTJ)	New	23, 44
TAYPortunity Program <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
TAYPortunity Transitional Subsidized Employment <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Workfare <ul style="list-style-type: none"> CUST_ACTIV.TYPE_CODE = 'WF' CT 56 Note: This activity belongs to both the CFET and GROW program. In the scenario the participant has a Workfare activity under both the CFET and GROW programs, to avoid double counting we will take the Workfare activity record with the latest Begin Date (CUST_ACTIV.BEG_DATE)	Workfare (W)	Existing	7, 28
CFET Retention Services <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Job Retention (JR)	Existing	9, 30
GROW Transition-Age Youth Employment Program (GTEP) <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
GROW Youth Employment Program (GYEP) <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Life Skills	Education Program Basic (EPB)	New	10, 31

<ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 			
Vocational Assessment <ul style="list-style-type: none"> Code value to be determined by developer working on SCR CA-254559 	Education Program Career (EPC)	New	11, 32



California Statewide Automated Welfare System

Design Document

CA-272652

Create County Duplicate Impact List pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/14/2024	1.0	Initial Design	Trevor Torres

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1 OVERVIEW

Currently any county can mark a person as a duplicate from a different county. This can cause issues with the counties when a person under their county is marked as a duplicate without their awareness. This SCR will create two new pages to notify when duplicate person is impacting the counties.

1.1 Current Design

Currently, any county can mark a single person record as a duplicate which can impact cases in other counties. This can cause issues with the counties when a person under their county is marked as a duplicate without their awareness.

1.2 Requests

Create a new page that will notify counties when a duplicate person is impacting them.

1.3 Overview of Recommendations

1. Create a new search page called "County Duplicate Impact List".
 - a. When a person is marked as a duplicate from the "Duplicate Person List" page, it will be recorded as an instance on this page and display the appropriate information when searched for.
 - i. Persons with multiple cases will have multiple instances displaying.
 - b. This page will be located in "e-Tools" under a new Task labeled "County Duplicate Impact".
 - i. This new Task will only display if the user is assigned to the new 'CountyDuplicateImpactView' Security Right.
2. Create a new page called "County Duplicate Impact Detail".
 - a. This page will display detailed information about the instance from the "County Duplicate Impact List" page.
 - b. The Edit mode of this page will allow users to change the "Status" field in the "General Duplicate Information" section, mark or unmark sections as "Reviewed:", and be able to add comments to why the 'Status' was changed.
 - i. This Edit mode of the page is accessed through either the "Edit" button on the "County Duplicate Impact List" page or the "Edit" button on the "County Duplicate Impact Detail" Page.
 1. These buttons will only display if the user is assigned to the new Security Right "CountyDuplicateImpactDetailEdit".
3. Create new batch to populate County Duplicate Impact Detail page.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.
2. Existing records that are currently marked as a “duplicate” will not be included in the “County Duplicate Impact List” page upon release. Only the records that have been marked as duplicate after these pages have been implemented will be added to the “County Duplicate Impact List” page.
3. The EBT section on the County Duplicate Impact Detail page will not display any EBT card that has not yet been added to CalSAWS. The worker has the option to add the cards in CalSAWS through the EBT Account page.
4. The Recovery Account section on the County Duplicate Impact Detail page will display only the Active Recovery account.

2 RECOMMENDATIONS

Currently, any county can mark a single person record as a duplicate which can impact cases in other counties. This can cause issues with the counties when a person under their county is marked as a duplicate without their awareness.

2.1 County Duplicate Impact List

2.1.1 Overview

This page allows you to search for a person's record that was marked as a duplicate and impacts a county.

2.1.2 County Duplicate Impact List Mockup

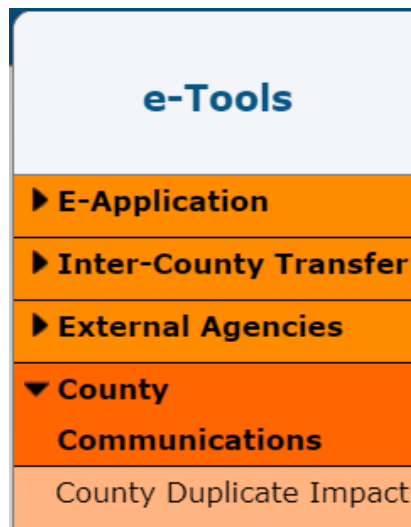


Figure 2.1.2.1 – County Communications E-Tools New Task Mockup

County Duplicate Impact List

▼ Refine Your Search

Search

Last Name: <input type="text"/>	First Name: <input type="text"/>	Middle/Initial Name: <input type="text"/>
Case Number: <input type="text"/>	CIN: <input type="text"/>	Date of Birth: <input type="text"/>
From: * <input type="text"/> 12/01/2023	To: * <input type="text"/> 01/30/2024	Status: <input type="text"/> New
Staff ID: <input type="text"/>		

Results per Page: 100 Search

This Type 1 page took 0.33 seconds to load.

Figure 2.1.2.2 – County Duplicate Impact List page before Search Mockup

County Duplicate Impact List

▼ Refine Your Search

Search

Last Name: <input type="text"/> Johnson	First Name: <input type="text"/>	Middle/Initial Name: <input type="text"/>
Case Number: <input type="text"/>	CIN: <input type="text"/>	Date of Birth: <input type="text"/>
From: * <input type="text"/> 12/01/2023	To: * <input type="text"/> 01/30/2024	Status: <input type="text"/>
Staff ID: <input type="text"/>		

Results per Page: 100 Search

Search Results Summary					Results 1 - 3 of 3
Name	Case Number	CIN	Status	Created Date	
Johnson, Kyle 47M(dup)	1111111	12345678A	New	12/01/2023	Edit
Johnson, Kyle 47M(dup)	5555555	12345678A	New	12/01/2023	Edit
Johnson, Picard 34M(dup)	2222222	90123456B	In-Process	12/23/2023	Edit
Johnson, Mike 24F(dup)	7777777	78901234C	Completed	01/15/2024	Edit

This Type 1 page took 0.33 seconds to load.

Figure 2.1.2.3 – County Duplicate Impact List page after Search Mockup

2.1.3 Description of Changes

1. Create a new page called "County Duplicate Impact List".
 - a. When a person is marked as a duplicate from the "Duplicate Person List" page, it will be recorded as an instance on this page and display the appropriate information after an overnight Batch Job (see section 2.3 for more information), as shown in Figure 2.1.2.3.
 - i. The records being displayed will only be the records for impacted cases within the user's county.
 - ii. Persons with multiple cases will have multiple instances displaying.
 - b. The "Last Name", "First Name", "Middle/Initial Name", "Case Number", "CIN", and "Date of Birth" search fields will search for records in the "County Duplicate Impact List" page with the same field name values in them and display in the "Search Results Summary" in their appropriate fields after selecting the "Search" button.
 - c. The "Status" search field will search for records in the "County Duplicate Impact List" page with the same values as the selected value from the dropdown (except for "Blank") in them and display in the "Search Results Summary" in the "Status" field after selecting the "Search" buttons.
 - i. The "Status" dropdown field will display the following options:
 1. "Blank"
 2. New
 3. In-Process
 4. Completed
 - ii. The page will default the "Status" field to "New" when accessing the page, as shown in Figure 2.1.2.2, but can be manually changed to any of the above options.
 - d. The "Staff ID" search option will find instances that were made by a certain staff member, however there will not be a "Staff ID" to display in the results.
 - e. The "To:" field will auto populate with the day the user accesses the page and the "From:" field will auto populate the date 60 days before the "From:" field.
 - i. These fields will be required.
 - ii. Display a validation message when the user clicks on the "Search" button and if the range goes beyond the 60 days.
 1. The validation will display the following message:
"To – Maximum range is 60 days. Please adjust the range."
 - iii. Display a validation message when the user clicks on the "Search" button when either of the text-area fields have 0 characters.

1. The validation will display the following message if the "To:" field is empty: "To – Field is required. Please enter a value."
2. The validation will display the following message if the "From:" field is empty: "From – Field is required. Please enter a value."
- iv. Display a validation message when the user clicks on the "Search" button when the date in "From:" is greater than the date in "To:".
 1. The validation will display the following message: "From – Date is greater than date in "To". Please enter a date that is before the date in "To".
- f. The "Search" buttons when selected will find records in the "County Duplicate Impact List" page that match with the inputted search fields.
- g. The default sorting will be based on the "Created Date" field, with the most recent date displaying first and follow chronologically. Additional cases/instances tied to that person will also be sorted based on the most recent date.
- h. Using the hyperlink on the name of the duplicate person will take the user to the 'View' mode of the "County Duplicate Impact Detail" page of that duplicate person's record.
- i. Using the "Edit" button next to a duplicate person's record will take the user to the 'Edit' mode of the "County Duplicate Impact Detail" page of that duplicate person's record.
 - i. The "Edit" button will only display if the user has the new Security Right "CountyDuplicateImpactDetailEdit".
- j. This page will be located in the Global Toolbar "e-Tools" under a new Task Header labeled "County Communications" when a new task labeled "County Duplicate Impact" will display, as shown in Figure 2.1.2.1.
 - i. The "County Duplicate Impact" Task will not display if the user does not have the 'CountyDuplicateImpactView' Security Right. See Section 2.1.5 for more information.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** County Duplicate Impact (This will only appear if the user has the new Security Right 'CountyDuplicateImpactView')

2.1.5 Security Updates

Adding new Security Rights and Security Groups for the new 'County Duplicate Impact List' and 'County Duplicate Impact Detail' pages.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyDuplicateImpactView	View county duplicate impact person(s) list and detail pages for impacted person record(s).	County Duplicate Impact View, County Duplicate Impact Detail Edit
CountyDuplicateImpactDetailEdit	Identify and update status of impacted duplicate person(s) records from the list page.	County Duplicate Impact Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Duplicate Impact View	View county duplicate impact person(s) list and detail.	View Only
County Duplicate Impact Detail Edit	Edit county duplicate impact person(s) detail status and make comments.	(County Determines Role Mapping)

2.1.6 Page Mapping

Create the Page Mapping for the new page.

2.1.7 Accessibility

This page will be created to meet the Accessibility requirements and standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 County Duplicate Impact Detail

2.2.1 Overview

This page allows you to view a person record within the cases of an impacted county that has been marked as a Duplicate. User's that are able to 'Edit' the record will be able to change the "Status" of the record, mark or unmark sections as "Reviewed:", and make comments on the change to the "Status" for the record.

2.2.2 County Duplicate Impact List Mockup

County Duplicate Impact Detail

*- Indicates required fields

Edit Close

General Duplicate Information			Reviewed: No
Last Name: Johnson	First Name: Kyle	Middle Name/Initial:	
Case Number <u>5555555</u>	CIN: 12345678A	Date of Birth: 01/01/1984	
Status: New	Created Date: 11/01/2023	Associated Cases: <u>Kyle Johnson</u>	

▼ Program(s) as of Created Date			Reviewed: No
Associated Program(s): MediCal	Person Status: Deregistered	Role: MEM	
CalFresh	Deregistered	MEM	

Golden Record				Reviewed: No
Name: <u>Kyle Jr. Johnson</u>	Date of Birth: 01/01/1984	CIN: 12345678A	SSN: 555-55-5555	

Add Person

Figure 2.2.2.1 – County Duplicate Impact Detail 'View' Mode 1st half Mockup

Associated Cases:	
<u>Kyle Johnson</u>	
Case Number	County
1111111	19
5555555	19
Reviewed: No	

Figure 2.2.2.2 – County Duplicate Impact Tool Tip "Associated Cases" Example Mockup

EBT					Reviewed: No
Account Number: 1111111111111111	Primary Card Holder: Johnson, Kyle 47M(dup)	Secondary Card Holder: Johnson, Kyle 47M(dup)	Current Address: 1111 Street Avenue	EBT Status: Active	Card Status: New

Recovery Account			Reviewed: No
Recovery Account Number: 222222222	Program Type: CalFresh	Benefit Month: 01/2024	

Time Limit Summary Links		Reviewed: No
Duplicate Person Link Johnson, Kyle 47M(dup)		

IPVs			Reviewed: No
Name: Johnson, Kyle 47M(dup)	Court Ordered Date: 01/05/2024	Effective Date: 01/05/2024	

▼ Absent/Unmarried Parent(s)				Reviewed: No
Name: Schmidt, Mike 67M(dup)	SSN: 444-44-4444	DOB: 01/01/1987	Address: 2222 Alley Street	
Name: Johnson, Kyle 47M(dup)	SSN: 111-11-1111	DOB: 01/01/1984	Address: 1111 Duplicate Street	

Self-Service Portal		Reviewed: No
Relinking Reminder Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.		

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

This [Type 1](#) page took 1.21 seconds to load.

Figure 2.2.2.3 – County Duplicate Impact Detail View Mode 2nd half Mockup

Golden Record				Reviewed: No
Name: Kyle Jr. Johnson	Date of Birth: 01/01/1984	CIN: 12345678A	SSN: 555-55-5555	

Add Person	Case Number	County
	9999999	19
	8888888	18

Figure 2.2.2.4 – County Duplicate Impact Tool Tip “Golden Record” Example Mockup

County Duplicate Impact Detail

*- Indicates required fields

Save

Cancel

General Duplicate Information			Reviewed: <input type="checkbox"/>
Last Name: Johnson	First Name: Kyle	Middle Name/Initial:	
Case Number 5555555	CIN: 12345678A	Date of Birth: 01/01/1984	
Status:* <input type="button" value="New"/>	Created Date: 11/01/2023	Associated Cases: Kyle Johnson	

▼ Program(s) as of Created Date			Reviewed: <input type="checkbox"/>
Associated Program(s): MediCal	Person Status: Deregistered	Role: MEM	
CalFresh	Deregistered	MEM	

Golden Record				Reviewed: <input type="checkbox"/>
Name: Kyle Jr. Johnson	Date of Birth: 01/01/1984	CIN: 12345678A	SSN: 555-55-5555	

Add Person

Figure 2.2.2.5 – County Duplicate Impact Detail Edit Mode 1st part Mockup

EBT						Reviewed: <input type="checkbox"/>
Account Number: 11111111111111	Primary Card Holder: Johnson, Kyle 47M(dup)	Secondary Card Holder: Johnson, Kyle 47M(dup)	Current Address: 1111 Street Avenue	EBT Status: Active	Card Status: New	

Recovery Account			Reviewed: <input type="checkbox"/>
Recovery Account Number: 22222222	Program Type: CalFresh	Benefit Month: 01/2024	

Time Limit Summary Links		Reviewed: <input type="checkbox"/>
Duplicate Person Link Johnson, Kyle 47M(dup)		

IPVs			Reviewed: <input type="checkbox"/>
Name: Johnson, Kyle 47M(dup)	Court Ordered Date: 01/05/2024	Effective Date: 01/05/2024	

Figure 2.2.2.6 – County Duplicate Impact Detail Edit Mode 2nd part Mockup

▼

Absent/Unmarried Parent(s)

Reviewed: ☐

Name:	SSN:	DOB:	Address:
Schmidt, Mike 67M(dup)	444-44-4444	01/01/1987	2222 Alley Street
Name:	SSN:	DOB:	Address:
Johnson, Kyle 47M(dup)	111-11-1111	01/01/1984	1111 Duplicate Street

Self-Service Portal

Reviewed: ☐

Relinking Reminder

Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.

Comments 

Save

Cancel

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Figure 2.2.2.7 – County Duplicate Impact Detail Edit Mode 3rd part Mockup

▼ Absent/Unmarried Parent(s)			Reviewed: No
Name:	SSN:	DOB:	Address:
Schmidt, Mike 67M(dup)	444-44-4444	01/01/1987	2222 Alley Street
Name:	SSN:	DOB:	Address:
Johnson, Kyle 47M(dup)	111-11-1111	01/01/1984	1111 Duplicate Street

Self-Service Portal**Reviewed: No**

Relinking Reminder

Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.

▼ Change History		Reviewed: No	
Staff Name:	Staff ID:	Date Time Stamped	Status Change:
Peter Parker	1234567	11/01/2023 08:00:00	Completed
Comments: Changed to Completed Status.			

Edit

Close

This Type 1 page took 1.21 seconds to load.

Figure 2.2.2.8 – County Duplicate Impact Detail View Mode “Change History” Mockup

▼ Absent/Unmarried Parent(s)			Reviewed: <input type="checkbox"/>
Name:	SSN:	DOB:	Address:
Schmidt, Mike 67M(dup)	444-44-4444	01/01/1987	2222 Alley Street
Name:	SSN:	DOB:	Address:
Johnson, Kyle 47M(dup)	111-11-1111	01/01/1984	1111 Duplicate Street

Self-Service Portal	Reviewed: <input type="checkbox"/>
Relinking Reminder Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.	

▼ Change Information		Reviewed: <input type="checkbox"/>
Staff Name:	Staff ID:	Date Time Stamped
Peter Parker	1234567	11/01/2023 08:00:00
Comments:	Status Change:	
Changed to Completed Status.	Completed	


Comments 
<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>

Figure 2.2.2.9 – County Duplicate Impact Detail Edit Mode “Change History” Mockup

Figure 2.2.2.10 – County Duplicate Impact Detail View Mode Check-Marked Example Mockup

1. Create a new page called "County Duplicate Impact Detail".
 - a. This page in View mode will display detailed information about the record.

- i. The information will only display the details obtained from the overnight Batch Job (See section 2.3 for more information).
 1. The information displaying will not be updated or editable (except for the "Status" field in the "General Duplicate Information" section) for the specific instance.
- ii. Each of the following sections will have "Reviewed:" to the right of their labels and will either display "Yes" or "No" depending on the checkboxes in 'Edit' mode.
 1. In 'View' mode, next to "Reviewed:" will display 'Yes' if the checkbox has been checked and saved when in 'Edit' mode, as shown in Figure 2.2.2.10.
 2. In 'View' mode, next to "Reviewed:" will display 'No' if the checkbox is not checked when in 'Edit' mode and saved, as shown in Figure 2.2.2.1 and Figure 2.2.2.3
- iii. The "General Duplicate Information" section will display demographic information, record status and created date, as shown in Figure 2.2.2.1.
 1. When a record is created for the "County Duplicate Impact Detail" page, the "First Name", "Middle Name", "Last Name", "Case Number", "CIN", and "Date of Birth" result fields will be populated from the duplicate record information from the "Individual Demographics Detail" page.
 - a. The "Case Number" field will only display one Case Number, which is based on the record selected from the "County Duplicate Impact List" page with the same Case Number.
 2. The "Status" field will display the status of the record that can be adjusted in the 'Edit' mode of this page.
 - a. The following options will display in the field:
 - i. New
 - ii. In-Process
 - iii. Completed
 - b. Newly created records on the "County Impact Duplicate Detail" page will have the "Status" field default to "New".
 - c. Records with the 'Status' of "Completed" will still be able to be editable.
 3. The "Created Date" field will display the date that this record was marked as a duplicate and added to the "County Impact Duplicate List" page.

4. The name displayed in the "Associated Cases" field will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.2.2.2.

Note: If the number of cases displaying in the Tooltip is greater than the length of the page, it will be cut off and be unable to display anymore cases.

- iv. The "Program(s) as of Created Date" section, as shown in Figure 2.2.2.1, will display:
 1. The programs associated with the duplicate person in the "Associated Program(s)" field.
 2. Their status is related to the program(s) in the "Person Status" field.
 3. The role they have for that program in the "Role" field.
 4. Make the "Program(s) as of Created Date" section collapsible.
 - a. The section will be collapsed by default.
- v. The "Golden Record" section will display the person record that is marked as the "Golden Record" for the duplicate person record the page is displaying, as shown in Figure 2.2.2.1.
 1. The fields will be populated from the "Individual Demographics Detail" page of the record that is the "Golden Record" of the duplicate person.
 2. The "Add Person" button will allow the user to add the Golden Record person that is being displayed in the "Golden Record" section as a Case Person to the case number of the Duplicate person that is being viewed.
 - a. If the Golden Record person is already a Case Person withing the case of the Duplicate person, then the button will dynamically disappear.
 - b. Users will only be able to see and use the "Add Person" button if they have the "CountyDuplicateImpactDetailEdit" Security Right assigned to them.
 3. The name displayed in the "Name" field of the "Golden Record" section will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.2.2.4.

- vi. The "EBT" section will display the information of the duplicate person on their current account with EBT.
 - 1. This section will pull the data elements from the 'EBT Account Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Account Number
 - b. Primary Card Holder
 - c. Secondary Card Holder
 - d. Current Address
 - e. EBT Status
 - f. Card Status
 - 2. The "Account Number" field will have a hyperlink that will take the user to the 'EBT Account Detail' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s) to view.
 - 3. This section is dynamic based on if the Duplicate Person is associated to an active EBT Account.
- vii. The "Recovery Account" section will display the information of the duplicate person if the recovery account has not been resolved as of being marked as a Duplicate.
 - 1. This Section will pull the data elements from the 'Overissuance Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Recovery Account Number
 - b. Program Type
 - c. Benefit Month
 - 2. The "Recovery Account Number" field will have a hyperlink that will take the user to the 'Recovery Account Detail' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. This section is dynamic based on if the Duplicate Person is associated to an unresolved Recovery Account when being marked as a Duplicate.
- viii. The "Time Limit Summary Links" section will display the "Duplicate Person Link" field shown in Figure 2.2.2.3.
 - 1. The hyperlink under the "Duplicate Person Link" field will take the user to the 'Time Limit Summary' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.

- a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 2. This section is dynamic based on if the Duplicate Person is associated to a Time Limits Account.
- ix. The "IPV" section will display the information of the duplicate person if there is a Court Order that has not been resolved as of being marked as a Duplicate.
 - 1. This Section will pull the data elements from the 'Permanency Plan Court Order Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Name
 - b. Court Ordered Date
 - c. Effective Date
 - 2. The field "Name" will have a hyperlink that will take the user to the 'Permanency Plan Court Order List' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. This section is dynamic based on if the Duplicate Person is associated to an unresolved Court Order when being marked as a Duplicate.
- x. The "Absent/Unmarried Parent(s)" section will display records from the "Absent/Unmarried Parent List", which can include the primary duplicate person.
 - 1. This Section will pull the data elements from the 'Support Questionnaire' page to the following fields for each record shown in Figure 2.2.2.3:
 - a. Name
 - b. SSN
 - c. DOB (Date of Birth)
 - d. Address
 - 2. The "Name" field will have a hyperlink will take the user to the 'Support Questionnaire' page of the person record that is being selected if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. Make the "Absent/Unmarried Parent(s)" section collapsible.
 - a. The section will be collapsed by default.

4. This section is dynamic based on if the Duplicate Person is associated to an absent/unmarried parent when being marked as a Duplicate.
- xi. The "Self-Service Portal" section will display a reminder message to the worker, shown in Figure 2.2.2.3.
 1. The section will display the message: "Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account."
 2. This section is dynamic based on if the Duplicate Person has a Self-Service Portal linked account.
 3. This section will still display even after the Golden Record has been relinked to their Self-Service Portal Account.
- xii. Add a "Change History" section, that records information on the user who made the change, what time it was changed to, and comments on why the "Status" field of the record was changed, as shown in Figure 2.2.2.8 and Figure 2.2.2.9.
 1. The "Change History" record will only be generated when a user has changed the "Status" field to a different value and saves from 'Edit' mode.
 2. The "Staff Name" and "Staff ID" fields will pull the name and the staff ID of the worker from the staff that made the change.
 - a. The Staff ID will link to the worker's Worker Detail page.
 3. The "Date Time Stamped" field will generate the date and time when a user makes a change in 'Edit' mode and saved on the "County Duplicate Impact Detail" page.
 - a. These instances of "History Details" will be sorted descending based off the most recent change.
 4. The "Status Changed" field will display the new value of the "Status" field.
 5. The "Comments:" field in the View mode will display what was written in the "Comments" section from the Edit mode of the "County Impact Duplicate Detail" page.
 6. Make the "Change Information" section collapsible.
 - a. The section will be collapsed by default.
- xiii. The "Edit" Button will allow the user to go into the 'Edit' mode of the Impact page.

1. If the user does not have the "CountyDuplicateImpactDetailEdit" Security Right, they will not see the 'Edit' button or be able to access the 'Edit' mode for the page. See Section 2.2.5 for more information.
- xiv. The "Close" Button will take the user to 'Impact List' page.
- b. The 'Edit' mode of this page is accessed through the "Edit" buttons on the "County Duplicate Impact List" and "County Duplicate Impact Detail" pages.
 - i. The "General Duplication Information" section will display the same information as the 'View' mode except for the "Status" field, where it will be a required dropdown field.
 1. The dropdown will display the following options:
 - a. New
 - b. In-Process
 - c. Completed
 - ii. Add "Comments" section with a text-area field to the Edit mode that will require users to provide more information as to the decision to adjust the information.
 1. If the "Status" value is changed to a different value from its previous value, this field will be required.
 2. This field will dynamically hide by default and will dynamically appear when the "Status" dropdown has been changed to a different value than the old value.
 3. Display a validation message when the user clicks on the "Save" button when the text-area field has more than 2000 characters.
 - a. The validation will display the following message: "Comments – [Text2000] Value is too long [Max. length: 2000.0]".
 4. Display a validation message when the user clicks on the "Save" button when the text-area field has 0 characters.
 - a. The validation will display the following message: "Comments – Field is required. Please enter a value."
 - iii. Additional sections will display the same information as the 'View' mode with no editable options to the fields.
 1. Checkboxes will appear to the right side of "Reviewed:" for each section (besides the "Comments" text-area field) when in 'Edit' mode, with the words "Reviewed:" to indicate users if a section has been looked at by a user, as shown in Figure 2.2.2.5, Figure 2.2.2.6, and Figure 2.2.2.7.

- a. These checkboxes will not change any values and will only be used for visual and informational tracking assistance.
- iv. The "Save" Button will save the changes made in 'Edit' mode to 'View' mode and check for validations, if applicable.
- v. The "Cancel" Button will take the user back to the 'View' mode of the page and will not save any changes made in 'Edit' mode.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** County Duplicate Impact (This will only appear if the user has the new Security Right 'CountyDuplicateImpactView')

2.2.5 Security Updates

Adding new Security Rights and Security Groups for the new 'County Duplicate Impact List' and 'County Duplicate Impact Detail' pages.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyDuplicateImpactView	View county duplicate impact person(s) list and detail pages for impacted person record(s).	County Duplicate Impact View, County Duplicate Impact Detail Edit
CountyDuplicateImpactDetailEdit	Identify and update status of impacted duplicate person(s) records from the list page.	County Duplicate Impact Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Duplicate Impact View	View county duplicate impact person(s) list and detail.	View Only
County Duplicate Impact Detail Edit	Edit county duplicate impact person(s) detail status and make comments.	(County Determines Role Mapping)

2.2.6 Page Mapping

Create the Page Mapping for the new page.

2.2.7 Accessibility

This page will be created to meet the Accessibility requirements and standards.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Create new batch to populate County Duplicate Impact Detail.

2.3.1 Overview

Create a new batch job to populate the new County Duplicate Impact Detail.

2.3.2 Description of Change

Create a batch job to populate the following sections on the County Duplicate Impact Detail page.

1. General Duplicate information
2. Programs
3. Golden Record
4. EBT
5. Recovery Account
6. Time Limit Summary Links
7. IPV
8. Absent/Unmarried Parent
9. Self-Service Portal

The record will be created when worker creates a record on the Duplicate Person List page. The batch will trigger when the Duplicate Person List Created On is between the Last Success Date and Batch Run Date. If the worker unduplicated the record before the nightly batch run, the Batch will not create a record.

The batch will create a County Duplicate Impact Detail for all the cases that the Duplicate person is associated to.

Example 1, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Then the worker unduplicated the person A at 2pm on the same day. The batch will not create a record on the County Duplicate Impact List page for person A.

Example 2, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. There will be 2 records: 1 for County 18 and 1 for County 19.

Example 3, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. Person is only active on County 19 case. Person is

discontinued or not in any program on County 18 case. There will be 2 records: 1 for County 18 and 1 for County 19.

Example 4, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. Person is Out of Home on County 18 case. There will be 2 records: 1 for County 18 and 1 for County 19.

The status of the County Duplicate Impact record will be 'New'.

The information on the County Duplicate Impact Detail page will not be changed by the batch job after the record creation date.

2.3.3 Execution Frequency

Daily (Mon-Sat) except Holidays.

2.3.4 Key Scheduling Dependencies

N/A.

2.3.5 Counties Impacted

All counties.

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

N/A

2.3.8 Failure Procedure/Operational Instructions

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

2.4 Automated Regression Test

2.4.1 Overview

Create automated regression test scripts to verify the navigation path to the County Duplicate Impact List page, the search field validations on the County Duplicate Impact List page, and page mapping entries for the County Duplicate Impact List and County Duplicate Impact Detail pages.

Note: The functionality of the County Duplicate Impact Detail page is out of scope due to the dependency on either (1) pre-existing data that will not be present at the time of implementation or (2) data created via batch job execution in the test environment.

2.4.2 Description of Changes

1. Create a regression script to verify the navigation flow to the County Duplicate Impact List page.
2. Create regression scripts to verify the following page validations display when applicable on the County Duplicate Impact List page:
 - a. "From" date is not populated.
 - b. "To" date is not populated.
 - c. "From" / "To" date range is greater than 60 days.
 - d. "From" date is greater than the "To" date.
3. Create regression scripts to verify that a page mapping entry exists for each applicable field on the following pages:
 - a. County Duplicate Impact Detail
 - b. County Duplicate Impact List

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix for the new Security Rights and Security Groups	CA-272652 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.2.3.5 CAR-485	The LRS shall provide a method for directly alerting a COUNTY-specified employee other than the worker when a community/client representative for a client makes contact with a Local Office Site. For example, the COUNTY may wish to have the Deputy District Director notified directly, if a community representative (such as one from a legal aid office) visits a Local Office Site.	The County Duplicate Impact pages notify COUNTY-specific employees when a change has been made to a duplicate person in their county.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-273724

Update Telephonic Signature Capture Code
Logic

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	Raji Sanuvala, Jared Kuester

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/24/2024	1.0	Initial - Draft	G. Limbrick
7/24/2024	1.1	<ol style="list-style-type: none"> Added clarification that the eCCP will trigger the Sent status based on the Start button/icon not based on pasting the Capture Code and The checkbox next to the Person row (used to select the person for removal), will be hidden/removed when/if the record is in "Sent" status 	G. Limbrick

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4	Outreach.....	Error! Bookmark not defined.
	4.1 Lists.....	Error! Bookmark not defined.

1 OVERVIEW

This SCR will prevent the removal/update of an Electronic Signature record while the associated Telephonic Signature call is in process.

1.1 Current Design

The Electronic Signature page allows you to request a signature for up to 2 participants (Persons) whose intent is to electronically sign a document, or a collection of up to 25 documents, when using the Telephonic 'Signature Method'.

Currently, for Telephonic type Electronic Signatures, CalSAWS users can update the Person(s) signing or update the collection of documents being signed at any time before the signature process is completed. Updating either the Person(s) or document(s) associated with a Telephonic signature causes any previously saved signature details to be discarded and a new Capture Code to be generated and associated to the signature request.

When a signature request is sent to the IVR (Interactive Voice Response application), from the CalSAWS application, CalSAWS updates the signature request's details to include the "Sent" status. Signature Requests can also be "pulled" into the IVR thru the eCCP (enhanced Call Control Panel) by pasting/typing a Capture Code into the eCCP. When details of a signature request are "pulled" into the IVR using a Capture Code, the "Sent" status is bypassed (the IVR will update the signature details with either the "Received" or the "Incorrect Response" status).

Updating Person(s) or Documents, (and causing a new Capture Code to be generated) also causes an error with any associated IVR call that is in process when the update occurs; the Capture Code, Person(s) and Document(s) are unique to each signature and must remain unchanged during a Telephonic Signature IVR or eCCP call.

1.2 Requests

Updates to associated Telephonic Signature request details, while the Telephonic Signature IVR call is in process, causes an error. Update CalSAWS to prevent modifications to Person(s), Document(s) or Capture Code(s) while a Telephonic Signature IVR call is in process.

1.3 Overview of Recommendations

1. Update the eCCP so that it puts a Telephonic Signature in "Sent" status **when the Start button/icon is pressed for a related Capture Code**

Note: AWS (Amazon Web Services) is already, later, changing the status to either "Received" or "Incorrect Response".

2. Update CalSAWS to prevent the Associated Document(s), Person(s), or Capture Code(s) from being changed during a Telephonic Signature call.

1.4 Assumptions

1. Fields and functionality not mentioned will not be changed.

2 RECOMMENDATIONS

2.1 eCCP Application

2.1.1 Overview

When a signature request is sent to the IVR (Interactive Voice Response application), from the CalSAWS application, CalSAWS updates the signature request's details to the "Sent" status. Signature Requests can also be "pulled" into the IVR thru the eCCP (enhanced Call Control Panel) by pasting/typing a saved Capture Code into the eCCP. When details of a signature request are "pulled" into the IVR using a Capture Code, the "Sent" status is bypassed; the IVR will update the signature details to either the "Received" or the "Incorrect Response" status.

Update the eCCP so that it puts a Telephonic Signature in "Sent" status when the Capture Code is validated.

2.1.2 IVR Application Mockup

N/A

2.1.3 Description of Changes

1. Update the eCCP so that when the Start button/icon is pressed, after validating a Capture Code:

- a. It puts the CalSAWS record in "Sent" status and
- b. The signature history is updated

Note: Existing logic sets the status after the call is over and the audio is processed.

Note: The record will remain in "Sent" status even if the Stop button/icon is pressed, because the IVR application needs the record to remain unchanged, until **both** the call has ended **and** the link to the trimmed recording has been posted to CalSAWS (Pressing the Start button more than once will not add more than one "Sent" status.)

2.1.4 Page Location

N/A

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

Not Assessed

2.1.8 Page Usage/Data Volume Impacts

None

2.2 Electronic Signature Page

2.2.1 Overview

When a signature request is sent to the IVR (Interactive Voice Response application), from the CalSAWS application, CalSAWS updates the signature request's details to include the "Sent" status. Signature Requests can also be "pulled" into the IVR thru the eCCP (enhanced Call Control Panel) by pasting/typing a Capture Code into the eCCP.

This SCR will update the eCCP so that it places a signature request in the "Sent" status when validating the related Capture Code, instead of bypassing the Sent status (see the eCCP Application section above).

Updating Person(s) or Documents, (and causing a new Capture Code to be generated) causes an error with any associated eCCP/IVR call that is in process when the update occurs.

Update CalSAWS to prevent the Associated Document(s), Person(s), or Capture Code(s) from being changed while a Telephonic Signature call is in "Sent" status.

2.2.2 Electronic Signature Page Mockup

Tulare
AT1

Case Info

Eligibility

Empl.
Services

Child Care

Resource
Databank

Fiscal

Special
Units

Reports

Client
Corresp.

Admin
Tools

Distributed Documents

Electronic Signature

*- Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Generate Form

Signature Method: *

Number of Signatures: *

Worker Name:

Worker ID:

Telephonic

2

Gerald Limbrick

90AS000Y00

Associated Documents

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
06/19/2024 10:02 AM	Applicant's Authorization for Release of Information (ENG)	ABCDM 228	Medi-Cal	Pending Print Central	

☐ Check to Read Rights and Responsibilities in the Telephonic Signature IVR

Person *	Date of Birth	Capture Code	Value	Status
<input checked="" type="checkbox"/> CARDER, DOGAN 70M	05/14/1954	20680318	<div>Copy</div> (805)999-1234	Sent
<input type="checkbox"/> Carder, Norwood 60F	04/03/1964	20680319	<div>Copy</div> 012 345 6789 ext. <div></div>	Not Sent <div>Call</div>

Remove

Audio and Transcript

CARDER, DOGAN 70M

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Incorrect Response

Carder, Norwood 60F

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Signature History - ABCDM 228

Save

Cancel

Figure 2.2.2.1 - Electronic Signature Page

2.2.3 Description of Changes

1. Update the "Associated Documents" panel: When any record is in "Sent" status, hide the checkboxes used to select a document for removal.
2. Update the 'Remove' button's logic, in the 'Associated Documents' panel: Hide this button when any signature request is in Sent status.
3. Update the 'Add Document(s)' button's logic: Hide this button when any signature request is in Sent status.
4. Update the 'Call' buttons' logic: Hide these buttons when their related signature request is in "Sent" status.
5. Update the 'Incorrect Response' button's logic: Show this button when the related signature request is in "Sent" status
Note: This will prevent a signature record from being "stuck" in "Sent" status, if an eCCP worker wishes to modify the associated documents after pressing the Start button/icon but before the end of the call (and/or before the signature audio processing is complete).
6. Update the logic on the 'Save' and 'Call' buttons:
 - a. Show a validation message if any/either Person/signer was removed while the Person's/signer's "Telephonic" signature request was in "Sent" status e.g., if removed by changing the 'Number of Signatures' dropdown:
 - i. Show the validation message as: "Number of Signatures - A Person cannot be removed while their Telephonic signature request is in Sent status."
 - ii. Clicking a link on this message will put focus on the 'Number of Signatures' dropdown
7. Update the page logic to remove/hide the checkbox next to the Person row (used to select the person for removal), when/if the record is in "Sent" status
8. Update the 'Save' button's logic:
 - a. When all associated documents and/or all Persons/signers were removed, update the signature request's status to Canceled
 - b. When/if the 'Signature Method' is not "Telephonic", validate that there is not a "Telephonic" signature request in Sent status, if there is:
 - i. Reload the page, updating the 'Signature Method' to "Telephonic" **Technical Note:** Reloading the page will update the dropdown based on the previously saved data.
 - ii. Show a validation message as "Signature Method – The Signature Method cannot be changed while a signature request is in Sent status. To cancel the signature request, use the 'Incorrect Response' button." Clicking a link on this message will put focus on the 'Signature Method' dropdown

2.2.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

The page was assessed for accessibility issues and the following deficiencies were identified:

1. DIV element with id="taskNavContainer" has role "tab list" and certain children elements do not have role "tab"
2. A validation message on the 'Call' button ("This Call was just started. Please click Cancel or Save to reload the page and try again.") has a list item () with no containing list e.g., . This may hinder screen reader/accessibility tool behavior. Contain this message, when displayed, in a list.
3. Active elements' IDs should be unique:
 - a. There are multiple active elements with ID= "Call"
 - b. There are multiple active elements with ID= "firstIncorrectResponseButton"

2.2.8 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.5.1.12	12. The LRS shall be able to capture, store, and display electronic signatures and signature dates.	This SCR Prevents a signature request from being altered while the signature call is "in-process". This contributes to the ability to store the details of that "in-process" signature.

3.2 Migration Requirements

N/A



California Statewide Automated Welfare System

Design Document

CA-274778 - (CSAC-46)

Strong Authentication for internal APIs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Adnan Bukahri
	Reviewed By	Sumeet Patil

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/02/2024	0.1	Initial version	Adnan B.
08/01/2024	1.0	Final Version	Adnan B.

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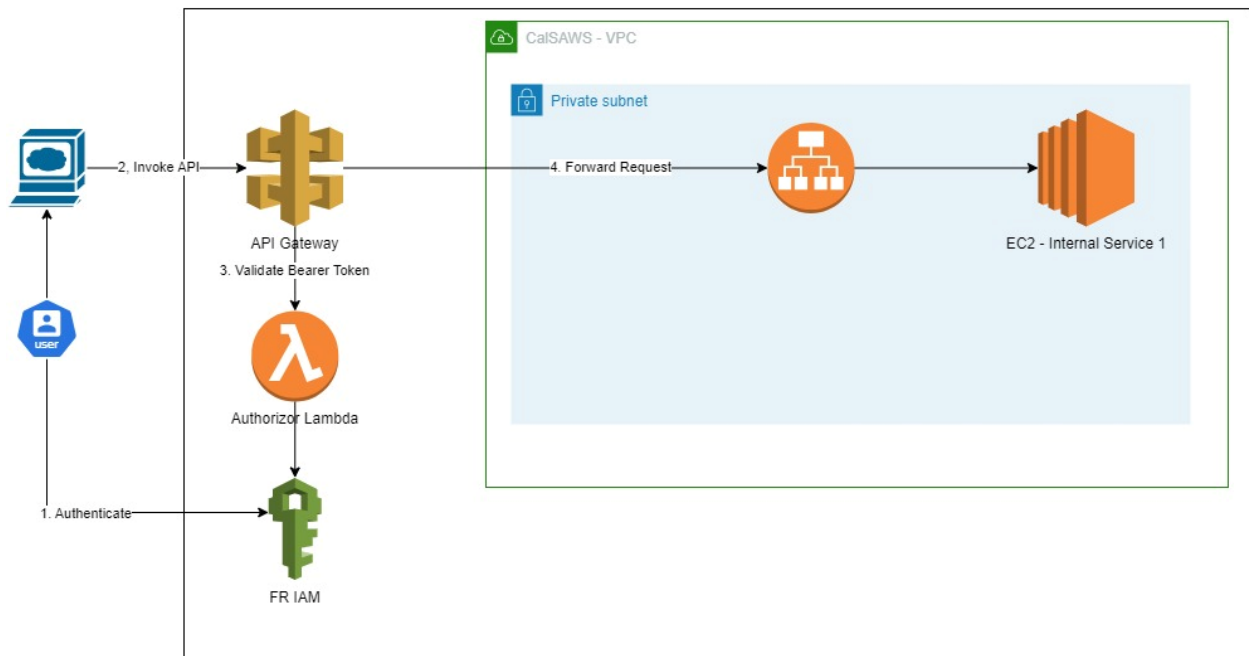
1 OVERVIEW

The purpose of this document is to outline the design and implementation plan to implement strong authentication methods for users and Systems accessing APIs using enterprise identity and access management (IAM) for both internal and external APIs. This is part of CalSAWS Zero Trust Architecture initiative.

1.1 Internal API Security Current State

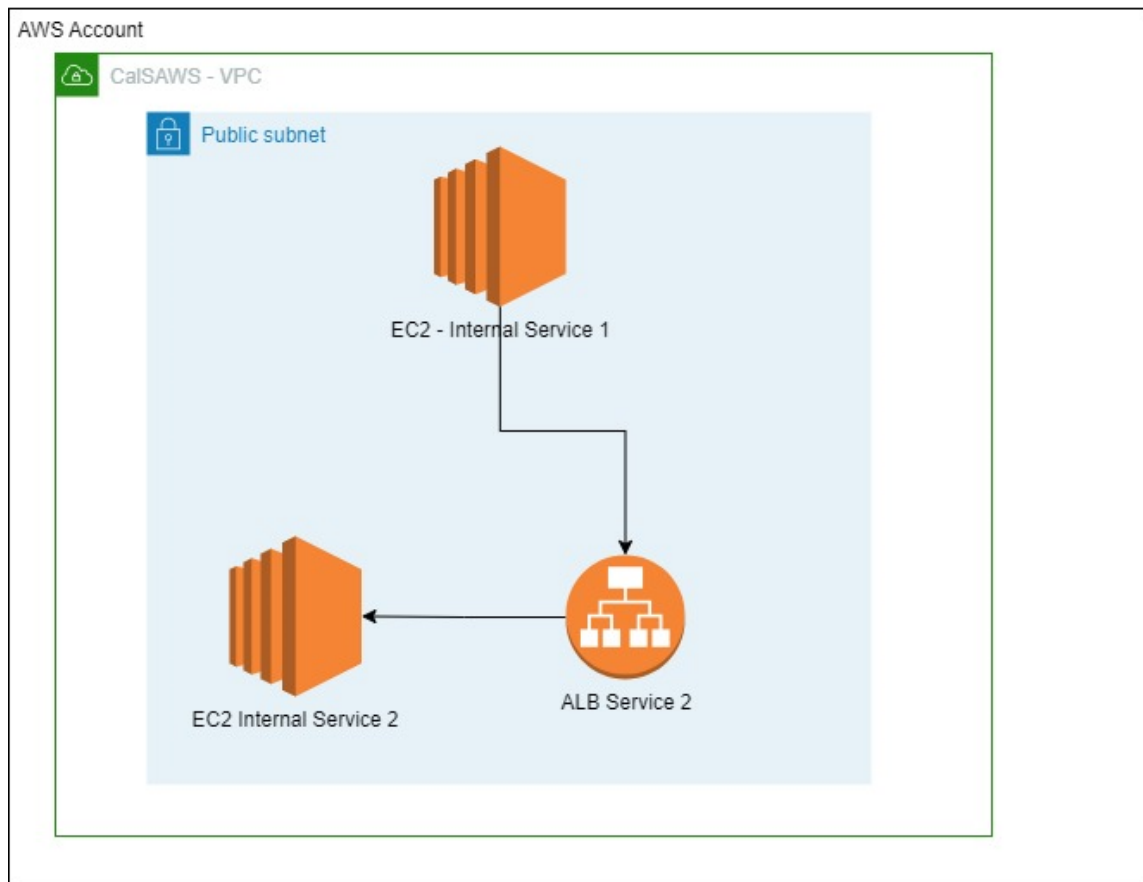
UI / Browser to Service

A custom Authorizer Lambda function is implemented to authorize the API consumers against ForgeRock enterprise Identity Management System.



1. API Consumer on-boarded on ForgeRock requests an OAUTH token before invoking the API.
2. API Consumer sets the OAUTH token as the Authorization header as part of the request.
3. Custom Authorizer Lambda extracts the OAUTH token from the header, gets the credentials to connect to ForgeRock from AWS Secrets Manager, and then invokes the ForgeRock introspect API for the provided OAUTH token.
 - a. If the token is valid, API Gateway allows the call to continue, otherwise an unauthorized error appears.
 - b. The authorizer lambda validates the API IDs against approved Client IDs. The mapping of API IDs and Client IDs are stored in AWS Secret Manager.
4. API Gateway sends the call to backend service through application load balancer.

Service to Service



Configure Security group rule to allow internal communication.

Currently there is no additional authentication / authorization is enforced for Internal Service to Service API calls.

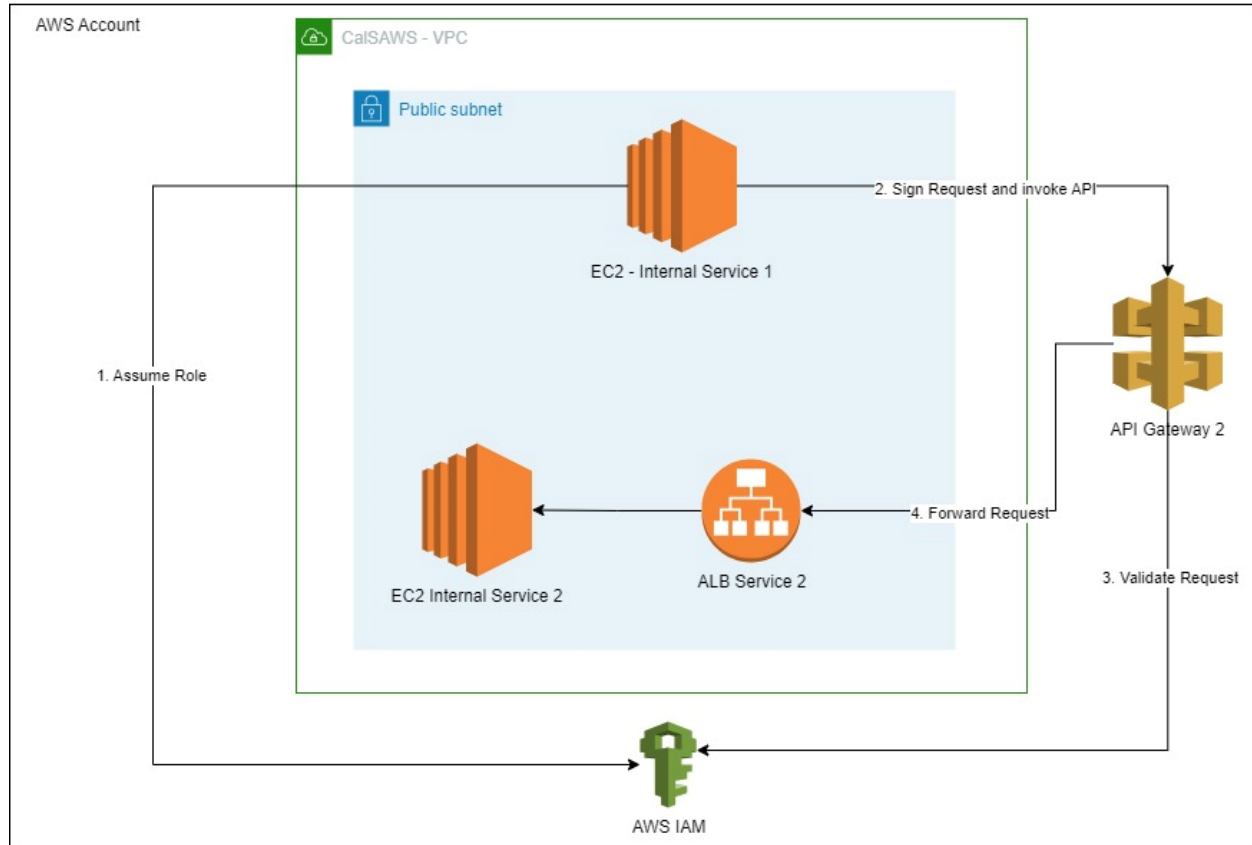
1.2 Request

Implement strong authentication methods for users and Systems accessing APIs using enterprise identity and access management (IAM) for both internal and external APIs.

2 RECOMMENDATIONS

2.1 Overview of Recommendations

- For UI / Browser-to-Service Pattern:
 - Continue using the ForgeRock Authorizer
- For Service-to-Service Pattern:
 - Use AWS IAM.



- API Client assumes role and signs the request using AWS Signature v4
- API Client invoke the Internal API Gateway URL
- API Gateway validates the request against IAM,
- If the IAM policy allows the API client API gateway forwards the request to the ALB otherwise throw 401 Unauthorized error.

AWS IAM provides the following benefits over using ForgeRock IAM.

- Reduced dependence from ForgeRock
- Integration with AWS API Gateway: Out of the box integration with AWS API Gateway makes it easy for authentication and authorization.
- Scalability: Natively scales with AWS infrastructure, handling large-scale operations efficiently.
- Cost: No additional cost.
- Fine-Grained Permissions: Offers detailed, fine-grained access control policies through IAM policies, roles, and permissions.

2.2 List of Internal APIs to be Secured

The internal domain name:

Non PROD: c<env>-api.appdev.aws.calsaws.net -- CoreApp

PROD: cprod-api.appprod.aws.calsaws.net

- CalSAWS service
- LRS webservice
- Texting
- Email Service
- File Service
- Imaging
- Child Care Portal - Audit
- Kafka Producer Service

2.3 List of Consuming Application to be Updated

- WDTIP
- Imaging Service
- Appointment Service
- CalSAWS Service
- Portal Service
- Activities Service
- Fiscal Service
- Imaging Service
- GAGR
- Journal MicroService
- Auditor
- CAISAWS Online

2.4 High Level Implementation Steps

- API Gateway:
 - Create New API Gateway with disabled public access point
 - Secure the Route with AWS IAM
 - Add mapping in private custom domain only
- Update Clients



California Statewide Automated Welfare System

Design Document

CA-275300

Update EDBC Logic to Not Exempt 'Title IV
Funded JOBS Program' From CF Student
Requirements

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/12/2024	1.0	Initial Draft	Tom Lazio

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1 OVERVIEW

The 'Title IV Funded JOBS Program' is a program option on the 'School Attendance Detail' page. CDSS has stated that 'Title IV Funded JOBS Program' no longer exists. This SCR will update the CF EDBC student work requirement logic to not exempt the CalFresh (CF) student participants with this program type option selected on the School Attendance Detail' page.

1.1 Current Design

Currently 'Title IV Funded JOBS Program' is a program option on the 'School Attendance Detail' page. This program type is currently exempt from CF student work requirements.

1.2 Requests

Per ACL 24-31, 'Title IV Funded JOBS Program' no longer exists so the Consortium is requesting that CalSAWS no longer exempts CalFresh (CF) student participants with this program type option selected on the School Attendance Detail' page.

1.3 Overview of Recommendations

1. Update CF EDBC Student Eligibility logic to no longer exempt participants who are enrolled in 'Title IV Funded JOBS Program' effective 05/2024.
2. Generate case listing of CF Student Cases Enrolled in 'Title IV Funded JOBS Program'.

1.4 Assumptions

1. The 'Title IV Funded JOBS Program' will remain as a 'Program Type' option on the School Attendance Detail' page.

2 RECOMMENDATIONS

2.1 CalFresh (CF) Eligible Student Logic Update To No Longer Exempt 'Title IV Funded JOBS Program'

2.1.1 Overview

An update will be made to the eligible CF student logic to no longer automatically exempt CF student recipients that participate in 'Title IV Funded JOBS Program' effective 05/2024.

2.1.2 Description of Changes

1. Effective 05/2024, update CF EDBC Student Eligibility logic to not exempt CF participant from 'Ineligible CF Student' status reason with 10-day notice when the following are true:
 - a. 'Participating in Program that Increases Employability' = 'Yes' on the School Attendance Detail page
-AND-
 - b. Program Type' on the School Attendance Detail page is 'Title IV Funded JOBS Program'.

2.1.3 Programs Impacted

CalFresh

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.14	The LRS shall determine which individuals must be included in the eligibility determination and take appropriate action(s), based on program rules. - Eligibility Determination and Benefit Calculation (EDBC)	This SCR will update the CF student eligibility exemption logic to no longer exempt CF student participants in 'Title IV Funded JOBS Program'.

4 OUTREACH

4.1 Lists

1. **List Name:** List of CF Student Cases Enrolled In Title IV Funded JOBS Program

List Criteria: All CF cases with student participants that meet the following criteria:

- i. Participant has an 'Active' CF program person status.
- ii. Participant is in a 'Active' CF program.
- iii. CF Participant has an effective (high dated) School Attendance Detail record where all the following are true:
 - a. 'Participating in Program that Increases Employability' (formerly-labeled-as 'Employment & Training Program Participation') = 'Yes'
 - b. 'Program Type' (formerly-labeled-as 'Employment & Training Program') = 'Title IV Funded JOBS Program'
 - c. 'Attendance Status' is either 'Attending Full Time' or 'Attending Half Time' and 'Status End Date' is high dated.

Standard Columns:

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

Additional Column(s):

- CF Participant Name
- School Name

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-275300



California Statewide Automated Welfare System

Design Document

CA-276128

Update the Property Limits for the Automated
Solution Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/11/2024	1.0	Initial Draft	Tom Lazio
07/19/2024	2.0	Revised design based on R1 feedback	Tom Lazio
07/22/2024	3.0	Update to Tulare's 2HH Personal Property and Liquid Asset limit per County feedback	Tom Lazio

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1 OVERVIEW

This SCR will update GA/GR Automated Solution countable resource limits for requesting counties who provided resource limit values to CalSAWS.

1.1 Current Design

The GA/GR Automated Solution resource limits are incorrect for the counties listed in this SCR.

1.2 Requests

The GA/GR Automated Solution resource limits need to be updated for the counties listed below who provided resource limit values to CalSAWS:

- Alameda
- Contra Costa
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- San Mateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura
- Yolo

1.3 Overview of Recommendations

1. CTCRs to set the 'end date' for existing, incorrect Liquid Asset, Real Property, Vehicle Property, and Personal Property limits for the counties mentioned in Section 1.2 (Request).
2. CTCRs to add new Liquid Asset, Real Property, Vehicle Property, and Personal Property limits for the counties mentioned in Section 1.2 (Request).

1.4 Assumptions

1. No resource amount changes needed for Fresno County.
2. No resource amount changes needed for 1HH in San Mateo, Santa Cruz, Sonoma, and Ventura counties.
3. Logic updates using cumulative income totals will be implemented as part of future SCR CA-270919.

4. Alameda currently exempts all vehicles so there will be no change to Vehicle resource limits.
5. Update to the vehicle exemption logic will be implemented in future SCR CA-278842 for Solano County.

2 RECOMMENDATIONS

2.1 GA/GR Automated Solution Property and Resource Limit Updates

2.1.1 Overview

Apply CTCR to end date existing resource limit amounts and add new resource limit amounts for the amounts and counties mentioned in Section 2.1.2 below.

2.1.2 Description of Changes

1. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Alameda County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
L7	Liquid Asset	01/01/1000	12/31/9999	01	1	0	LA
6A	Real Property Limit	01/01/1000	12/31/9999	01	1	0	RP

2. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Contra Costa County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
7A	Real Property Limit	01/01/1000	12/31/9999	07	1	0	RP

3. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Placer County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
5N	Vehicle Property Limit	01/01/1000	12/31/9999	31	1	1500	VP
1B	Real Property Limit	01/01/1000	12/31/9999	31	1	0	RP

4. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Sacramento County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
2B	Real Property Limit	01/01/1000	12/31/9999	34	1	1000	RP

5. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for San Diego County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
X1	Personal Property Limit	01/01/1000	12/31/9999	37	1	250	PP
7N	Vehicle Property Limit	01/01/1000	12/31/9999	37	1	1500	VP

6. Set the End Date to **06/30/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for San Francisco County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
8N	Vehicle Property Limit	01/01/1000	12/31/9999	38	2	9500	VP

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
9N	Vehicle Property Limit	01/01/1000	12/31/9999	38	1	9501	VP
4B	Real Property Limit	01/01/1000	12/31/9999	38	1	0	RP

7. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for San Luis Obispo County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
M8	Liquid Asset	01/01/1000	12/31/9999	40	2	3000	LA
M9	Liquid Asset	01/01/1000	12/31/9999	40	1	2000	LA
X4	Personal Property Limit	01/01/1000	12/31/9999	40	2	3000	PP
X5	Personal Property Limit	01/01/1000	12/31/9999	40	1	2000	PP
7B	Real Property Limit	01/01/1000	12/31/9999	40	1	0	RP
1O	Vehicle Property Limit	01/01/1000	12/31/9999	40	2	9500	VP
2O	Vehicle Property Limit	01/01/1000	12/31/9999	40	1	9501	VP

8. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Santa Barbara County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
X7	Personal Property Limit	01/01/1000	12/31/9999	42	1	500	PP

9. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Santa Clara County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
8B	Real Property Limit	01/01/1000	12/31/9999	43	1	99999	RP
M5	Liquid Asset	01/01/1000	12/31/9999	43	1	0	LA

10. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Solano County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
1C	Real Property Limit	01/01/1000	12/31/9999	48	1	359	RP
7O	Vehicle Property Limit	01/01/1000	12/31/9999	48	1	359	VP
N4	Liquid Asset	01/01/1000	12/31/9999	48	1	0	LA
Y1	Personal Property Limit	01/01/1000	12/31/9999	48	1	359	PP

11. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Tulare County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
9O	Vehicle Property Limit	01/01/1000	12/31/9999	54	1	25483	VP
N6	Liquid Asset	01/01/1000	12/31/9999	54	1	0	LA
Y3	Personal Property Limit	01/01/1000	12/31/9999	54	1	0	PP

12. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Yolo County:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
5C	Real Property Limit	01/01/1000	12/31/9999	57	1	500	RP
N8	Liquid Asset	01/01/1000	12/31/9999	57	1	0	LA

13. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Alameda County effective as of **09/01/2023** as shown below:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
L7	Liquid Asset	09/01/2023	12/31/9999	01	1	1000	LA
6A	Real Property Limit	09/01/2023	12/31/9999	01	1	999999	RP
1N	Vehicle Property Limit	09/01/2023	12/31/9999	01	1	999999	VP
TBD*	Liquid Asset	09/01/2023	12/31/9999	01	2	1000	LA
TBD*	Personal Property Limit	09/01/2023	12/31/9999	01	2	1000	PP
TBD*	Real Property Limit	09/01/2023	12/31/9999	01	2	999999	RP

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	01	2	999999	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

14. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Contra Costa County effective as of **09/01/2023** as shown below:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
7A	Real Property Limit	09/01/2023	12/31/9999	07	1	500	RP
TBD*	Real Property Limit	09/01/2023	12/31/9999	07	2	500	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	07	2	500	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	07	2	500	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	07	2	4500	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

15. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Orange County effective as of **09/01/2023** as shown below:

Code_Num _Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Real Property Limit	09/01/2023	12/31/9999	30	2	5000	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	30	2	1000	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	30	2	1000	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	30	2	4650	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

16. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Placer County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
5N	Vehicle Property Limit	09/01/2023	12/31/9999	31	1	75	VP
1B	Real Property Limit	09/01/2023	12/31/9999	31	1	75	RP
TBD*	Real Property Limit	09/01/2023	12/31/9999	31	2	75	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	31	2	75	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	31	2	75	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	31	2	75	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

17. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Sacramento County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
2B	Real Property Limit	09/01/2023	12/31/9999	34	1	0	RP
TBD*	Real Property Limit	09/01/2023	12/31/9999	34	2	0	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	34	2	250	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	34	2	20	LA

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	34	2	2000	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

18. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Diego County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
X1	Personal Property Limit	09/01/2023	12/31/9999	37	1	1500	PP
7N	Vehicle Property Limit	09/01/2023	12/31/9999	37	1	4650	VP
TBD*	Real Property Limit	09/01/2023	12/31/9999	37	2	0	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	37	2	1500	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	37	2	50	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	37	2	4650	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH

19. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Francisco County effective as of **dates** shown in the table below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
8N	Vehicle Property Limit	07/01/2023	06/30/2024	38	2	32045	VP
9N	Vehicle Property Limit	07/01/2023	06/30/2024	38	1	32045	VP

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
8N	Vehicle Property Limit	07/01/2024	12/31/9999	38	2	32968	VP
9N	Vehicle Property Limit	07/01/2024	12/31/9999	38	1	32968	VP
4B	Real Property Limit	09/01/2023	12/31/9999	38	1	2000	RP
TBD*	Real Property Limit	09/01/2023	12/31/9999	38	2	3000	RP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

20. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Luis Obispo County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
M8	Liquid Asset	09/01/2023	12/31/9999	40	2	1000	LA
M9	Liquid Asset	09/01/2023	12/31/9999	40	1	1000	LA
X4	Personal Property Limit	09/01/2023	12/31/9999	40	2	1000	PP
X5	Personal Property Limit	09/01/2023	12/31/9999	40	1	1000	PP
7B	Real Property Limit	09/01/2023	12/31/9999	40	1	1000	RP
TBD*	Real Property Limit	09/01/2023	12/31/9999	40	2	1000	RP
1O	Vehicle Property Limit	09/01/2023	12/31/9999	40	2	1000	VP
2O	Vehicle Property Limit	09/01/2023	12/31/9999	40	1	1000	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

21. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Mateo County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Real Property Limit	09/01/2023	12/31/9999	41	2	1464	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	41	2	1464	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	41	2	1464	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	41	2	1464	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

22. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Santa Barbara County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
X7	Personal Property Limit	09/01/2023	12/31/9999	42	1	50	PP
TBD*	Real Property Limit	09/01/2023	12/31/9999	42	2	5000	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	42	2	50	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	42	2	50	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	42	2	1500	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

23. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Santa Clara County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
8B	Real Property Limit	09/01/2023	12/31/9999	43	1	500	RP
M5	Liquid Asset	09/01/2023	12/31/9999	43	1	500	LA
TBD*	Real Property Limit	09/01/2023	12/31/9999	43	2	500	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	43	2	500	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	43	2	500	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	43	2	4650	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

24. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Santa Cruz County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Real Property Limit	09/01/2023	12/31/9999	44	2	25000	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	44	2	200	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	44	2	300	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	44	2	9300	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

25. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Solano County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
1C	Real Property Limit	09/01/2023	12/31/9999	48	1	429	RP
7O	Vehicle Property Limit	09/01/2023	12/31/9999	48	1	0	VP
N4	Liquid Asset	09/01/2023	12/31/9999	48	1	429	LA
Y1	Personal Property Limit	09/01/2023	12/31/9999	48	1	429	PP
TBD*	Real Property Limit	09/01/2023	12/31/9999	48	2	697	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	48	2	697	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	48	2	697	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	48	2	0	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

26. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Sonoma County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Real Property Limit	09/01/2023	12/31/9999	49	2	500	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	49	2	500	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	49	2	50	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	49	2	2500	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

27. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Tulare County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
90	Vehicle Property Limit	09/01/2023	12/31/9999	54	1	32968	VP
N6	Liquid Asset	09/01/2023	12/31/9999	54	1	262	LA
Y3	Personal Property Limit	09/01/2023	12/31/9999	54	1	262	PP
TBD*	Real Property Limit	09/01/2023	12/31/9999	54	2	0	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	54	2	429	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	54	2	429	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	54	2	32968	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

28. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Ventura County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
TBD*	Real Property Limit	09/01/2023	12/31/9999	56	2	1000	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	56	2	1000	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	56	2	100	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	56	2	1500	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

29. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Yolo County effective as of **09/01/2023** as shown below:

Code_Num_Identif	Short Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GA GR Resource Limit Categories
5C	Real Property Limit	09/01/2023	12/31/9999	57	1	1000	RP
N8	Liquid Asset	09/01/2023	12/31/9999	57	1	1000	LA
TBD*	Real Property Limit	09/01/2023	12/31/9999	56	2	1000	RP
TBD*	Personal Property Limit	09/01/2023	12/31/9999	56	2	1000	PP
TBD*	Liquid Asset	09/01/2023	12/31/9999	56	2	1000	LA
TBD*	Vehicle Property Limit	09/01/2023	12/31/9999	56	2	4650	VP

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

2.1.3 Programs Impacted

GA/GR Automated Solution

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.	This SCR will update GA/GR Automated Solution resource limits based on county provided input.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-277518

ACL 11-80 - Add the M44-350A/E/G into the Template
Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Aishwarya Shankar
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/24/2024	1.0	Initial Draft	Aishwarya Shankar
06/17/2024	2.0	2 nd Draft post-discussion with BA	Aishwarya Shankar
07/22/2024	3.0	Update to form titles' formatting (capitalization)	Aishwarya Shankar

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1 OVERVIEW

The effort of this SCR will be to add the M44-350A/E/G into the Template Repository.

1.1 Current Design

The M44-350A/E/G were implemented as NOA fragments with SCR CA-214165 in release 21.11.

1.2 Requests

Add the M44-350A into the Template Repository in English, Spanish, Chinese, Russian, and Vietnamese. Add the M44-350E and M44-350G into the Template Repository in English.

1.3 Overview of Recommendations

1. Add the M44-350A into the Template Repository
2. Add the M44-350E into the Template Repository
3. Add the M44-350G into the Template Repository

1.4 Assumptions

1. SCR CA-278549 will implement the rest of the threshold languages once provided by CDSS.
2. The M44-350A is implemented in only English, Spanish, Chinese, Russian, and Vietnamese with this SCR and not Cambodian, as its attached NA 275 page has not been provided in Cambodian by CDSS.
3. The M44-350E and M44-350G are implemented only in English with this SCR, as their corresponding budget pages (NA 279 and NA 280, respectively) have not been provided in any threshold languages by CDSS.
4. There are no changes to any current functionality of these notices/NOA fragments unless specified in the recommendation of this design document.
5. CA-277519 will add the NA 274J to generate with automated OP NOAs and add it to the Template Repository. The NA 274J will be used for overpayments occurring on or after 6-1-2022. The NA 274I is used for overpayments occurring between 6-1-2021 and 5-31-2022. For the purposes of the mockups associated with this SCR, the NA 274I is used.

2 RECOMMENDATIONS

2.1 Add the M44-350A into the Template Repository

2.1.1 Overview

This recommendation is to add the M44-350A – Overpayment Adjustment into the Template Repository.

State Form: M44-350A (11/11)

Programs: CalWORKs

Attached Forms: NA 274I, NA 275

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Spanish, Chinese, Vietnamese, and Russian

2.1.2 Form Verbiage

Create M44-350A Form XDP

The XDP of the M44-350A form will be based off of the XDPs for the reason, action, and message fragments created for the M44-350A as part of SCR CA-214165.

The template that is used is the NA 200 (excluding the NA 200 budget page, as the NA 274I and NA 275 are used instead).

***TECHNICAL NOTE:** These fragments are:

CW_CH_OVERPAY_ADJUSTMENT_A400, CW_CH_ACTION10, and CW_CH_MESSAGE5.

Form Header: CalSAWS Standard Header (HEADER_1)

Form Title: NOTICE OF ACTION CALWORKS CHANGE - Overpayment Adjustment

- **Title listed on Template Repository:** NOTICE OF ACTION CALWORKS CHANGE - Overpayment Adjustment

Form Number: M44-350A (11/11)

Include NA Back 9: Yes

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

Imaging Form Name: Overpayment Adjustment

Imaging Document Type: Overpayment/Overissuance (OP/OI)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form Variable Population

The M44-350A form variable population will follow the variable population logic of its corresponding NOA fragments as outlined in the design document of SCR CA-214165. This form will be pre-populated as stated on the NOA fragment SCR when generated from the Template Repository in the context of a case.

2.1.4 Form Generation Conditions

1. Add Form to Template Repository

M44-350A will be added to the template repository with the following document parameters:

Required Document Parameters: Case Number, Customer Name, Program, Language, Recovery Account

2. Add Form Control

The M44-350A will have the following form control:

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

3. Add Form Print Options and Mailing Requirements

Blank Template	Print Local Without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Options:

Mail-To (Recipient): Customer name selected from dropdown in the document parameters page

Mailed From (Return): Sending Office
Mail-back-to Address: None
Outgoing Envelope Type: Standard Mail
Return Envelope Type: None

Additional Options:

Special Paper Stock: No
Enclosures: None
Electronic Signature: No
 Electronic Signature (IVR/Text): No
 Check to Sign: No
Post to Self Service Portal (SSP): Yes

2.2 Add the M44-350E into the Template Repository

2.2.1 Overview

This recommendation is to add the M44-350E - Excess Property O/P and Adjustment((W/O Good Faith) into the Template Repository.

State Form: M44-350E (11/11)

Programs: CalWORKs

Attached Forms: NA 280, NA 275

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English

2.2.2 Form Verbiage

Create M44-350E Form XDP

The XDP of the M44-350E form will be based off of the XDPs for the reason, action, and message fragments created for the M44-350E as part of SCR CA-214165.

The template that is used is the NA 200 (excluding the NA 200 budget page, as the NA 280 and the NA 275 are used instead).

***TECHNICAL NOTE:** These fragments are:

CW_CH_OVERPAY_RSN_PROP_NOT_GOOD_FAITH_A401,
CW_CH_ACTION7, and CW_CH_MESSAGE6.

Form Header: CalSAWS Standard Header (HEADER_1)

Form Title: NOTICE OF ACTION CALWORKS CHANGE – Excess Property O/P and Adjustment

- **Title listed on Template Repository:** NOTICE OF ACTION CALWORKS CHANGE - Excess Property O/P and Adjustment

Form Number: M44-350E (11/11)

Include NA Back 9: Yes

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

Imaging Form Name: Excess Property O/P and Adjustment

Imaging Document Type: Overpayment/Overissuance (OP/OI)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #2

2.2.3 Form Variable Population

The M44-350E form variable population will follow the variable population logic of its corresponding NOA fragments as outlined in the design document of SCR CA-214165. This form will be pre-populated as stated on the NOA fragment SCR when generated from the Template Repository in the context of a case.

2.2.4 Form Generation Conditions

1. Add Form to Template Repository

M44-350E will be added to the template repository with the following document parameters:

Required Document Parameters: Case Number, Customer Name,

Program, Language, Recovery Account

2. Add Form Control

The M44-350E will have the following form control:

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

3. Add Form Print Options and Mailing Requirements

Blank Template	Print Local Without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Options:

Mail-To (Recipient): Customer name selected from dropdown in the document parameters page

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard Mail

Return Envelope Type: None

Additional Options:

Special Paper Stock: No

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

2.3 Add the M44-350G into the Template Repository

2.3.1 Overview

This recommendation is to add the M44-350G - Excess Prop O/P Adjustment (With Good Faith) into the Template Repository.

State Form: M44-350G (11/11)

Programs: CalWORKs

Attached Forms: NA 279, NA 275

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English

2.3.2 Form Verbiage

Create M44-350G Form XDP

The XDP of the M44-350G form will be based off of the XDPs for the reason, action, and message fragments created for the M44-350G as part of SCR CA-214165.

The template that is used is the NA 200 (excluding the NA 200 budget page, as the NA 279 and the NA 275 are used instead).

***TECHNICAL NOTE:** These fragments are:

CW_CH_OVERPAY_RSN_PROP_GOOD_FAITH_A404, CW_CH_ACTION7, and CW_CH_MESSAGE6.

Form Header: CalSAWS Standard Header (HEADER_1)

Form Title: NOTICE OF ACTION CALWORKS CHANGE – Excess Prop O/P Adjustment (With Good Faith)

- **Title listed on Template Repository:** NOTICE OF ACTION CALWORKS CHANGE - Excess Prop O/P Adjustment (With Good Faith)

Form Number: M44-350G (11/11)

Include NA Back 9: Yes

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

Imaging Form Name: Excess Prop O/P Adjust (W/ Good Faith)

Imaging Document Type: Overpayment/Overissuance (OP/OI)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #3

2.3.3 Form Variable Population

The M44-350G form variable population will follow the variable population logic of its corresponding NOA fragments as outlined in the design document of SCR CA-214165. This form will be pre-populated as stated on the NOA fragment SCR when generated from the Template Repository in the context of a case.

2.3.4 Form Generation Conditions

1. Add Form to Template Repository

M44-350G will be added to the template repository with the following document parameters:

Required Document Parameters: Case Number, Customer Name, Program, Language, Recovery Account

2. Add Form Control

The M44-350G will have the following form control:

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

3. Add Form Print Options and Mailing Requirements

Blank Template	Print Local Without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Options:

Mail-To (Recipient): Customer name selected from dropdown in the document parameters page

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard Mail

Return Envelope Type: None

Additional Options:

Special Paper Stock: No

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	M44-350A Mockup	M44-350A_EN.pdf
2	Forms	M44-350E Mockup	M44-350E_EN.pdf
3	Forms	M44-350G Mockup	M44-350G_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	This SCR adds the M44-350A, E, and G to the Template Repository.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-277519

Add NA 274J into CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Justin Bourbonniere
	Reviewed By	Phong Xiong, Maria Arceo, Priya Sridharan, Sunitha Sampathkumar, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/25/2024	1.0	Original Draft	Justin Bourbonniere
07/10/2024	1.1	BA Review feedback	Justin Bourbonniere
07/16/2024	1.2	BA Review feedback	Justin Bourbonniere

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1 OVERVIEW

This SCR will update the Overpayment Continuation Budget (NA 274) to the NA 274J (7/21) for existing NOAs where previous versions of the NA 274 Budget fragment are being used. NA 274J will be added to the template repository. The NA Back 9 will be removed from NA 274 versions in the template repository.

1.0 Current Design

The NA 274 budget pages are used for overpayment NOAs and forms. The different NA 274 versions (i.e., NA 274G, NA 274H, etc.) are used based on the time period in which the overpayment takes place. The latest NA 274J (7/21) has not yet been added to CalSAWS as a NOA fragment.

1.1 Requests

1. Add the Overpayment Continuation Budget NA 274J (7/21) to generate with the automated OP NOAs.
2. Add a New NA 274J (7/21) Continuation Page – Overpayment Computations Form to the template repository.
3. Remove the NA Back 9 from the NA 274G, H, I stand-alone forms in the template repository.

1.2 Overview of Recommendations

1. Add the Overpayment Continuation Budget NA 274J (7/21) to generate with the automated OP NOAs.
2. Add a New NA 274J (7/21) Continuation Page – Overpayment Computations Form to the template repository.
3. Remove the NA Back 9 from the NA 274G, H, I stand-alone forms in the template repository.

1.3 Assumptions

1. The NA 274J (7/21) is only implemented in English, Chinese, Russian, Spanish, and Vietnamese as a NOA fragment, due to the Overpayment NOA M44-350A - Overpayment Adjustment is implemented in these languages. The stand-alone form in the template repository is implemented in all 19 threshold languages into the Template Repository.
2. The NA 274J (7/21) variable names and population logic follows the existing NA 274I variable names and population logic (see CA-214165).
 - a) The NA 274J form version will follow the logic of the NA 274I form version.
 - b) The NA 274J NOA version will follow the logic of the NA 274I NOA version.
3. This SCR will go together in the same release with CA-277520 which will update the NA 274 population logic of the "Support Payments Collected For You" field.
4. SCR CA-280419 will update the following existing packets (CalWORKs Overpayment Packet, Demand NOA Packet) and sets (M44350I Set) which use the most current NA 274 budget.

2 RECOMMENDATIONS

2.0 Adding a New NA 274J Continuation Page – Overpayment Computations Fragment Recommendation

2.0.0 Overview

The NA 274J (7/21) is a continuation page for the overpayment computations in cases of an overpayment and grant adjustment occurring on or after 6/1/2022.

State Form/NOA: NA 274J (7/21)

NOA Template ID(s): CW_NOA_TEMPLATE_EN (Fragment ID: 3026)

Budget Name: NA 274J Continuation Page – Overpayment Computations

Program(s): CalWORKs

Action Type: Benefit Change

Fragment Level: Program

Repeatable: No

Languages:

English, Chinese, Russian, Spanish, Vietnamese

2.0.1 Create Budget Fragment XDP

Create a new XDP fragment for the NA 274J Continuation Page – Overpayment Computations.

NOA Mockups/Examples: See supporting document #1

2.0.2 Add Budget Fragment Generation

This budget fragment will generate with the reason fragments for the M44-350A - Overpayment Adjustment NOA & CalWORKs Recomputed NOA reason fragments. The NA 274I will be replaced by the NA 274 J (7/21) on the MA44-350A and the NA 274G will be replaced by the NA 274 J (7/21) on the CalWORKs Recomputed NOA.

Ordering on NOA: This budget will generate as a separate page, directly following the NA Back 9 on the dynamically generated NOA with the reason fragments.

Technical note:

NOA Name	Action Snippet ID	Reason Snippet ID	Message Snippet ID
M44-350A	7797	4153	5131
CalWorks Recomputed NOA	6260	null	5073

2.0.3 Add Budget Fragment Variable Population

The variable population logic for the NA 274J budget will follow the existing functionality of the previous NA 274 forms and NOAs.

The population logic for the "Support Payments Collected For You" field will be updated to populate from the 'TIME_LIMIT_AID' table per CA-277520. The population logic will be updated for the NOA version of NA 274 J.

Variable Name	Population	Formatting*
CS_DOLLAR_A MT	<p>This populates with the value from Case Info -> Case Summary -> Time Limit Aid Summary page. The Support Payments Collected for You field on the NA 274 form should be the total child support payments collected in the benefit month. The benefit month is shown on the 'Child Support Collection Detail' page.</p> <p>(Use database value TIME_LIMIT_AID.CS_COLLECT_AMT is the total amount collected. This value should populate on the NA 274J. TIME_LIMIT_AID.EFF_DATE is the benefit month.)</p>	<p>Arial Size 10 Font, in a currency format.</p> <p>For example, "1,000.00"</p>

2.1 Add a New NA 274J Continuation Page – Overpayment Computations Form Recommendation

2.1.0 Overview

The NA 274J will be implemented as a stand-alone form to the template repository.

State Form/NOA: NA 274J (Revision 7/21)

Programs: CalWORKs

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mein, Punjabi, Russian, Spanish, Tagalog, Thai, Ukrainian, & Vietnamese

2.1.1 Create NA 274J Form XDP

Create the form XDP for the NA 274J Continuation Page – Overpayment Computations form.

Form Header: None

Form Title (Document List Page Displayed Name): Continuation Page – Overpayment Computations

Form Number: NA 274J

Include NA Back 9: No

Imaging Form Name: Cont Page - OP Computations 274J

Imaging Document Type: Notification/NOAs

Form Mockups/Examples: See supporting document #1

2.1.2 Add Form Control for the NA 274J Form

Add an Imaging Barcode for the NA 274J form.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.1.3 Add the NA 274J Form to the Template Repository

Add the NA 274J Continuation Page – Overpayment Computations to the template repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.1.4 Add NA 274J Form Print Options and Mailing Requirements

The print options checked below will be available for this form.

BLANK TEMPLATE	PRINT LOCAL WITHOUT SAVE	PRINT LOCAL AND SAVE	PRINT CENTRAL AND SAVE	REPRINT LOCAL	REPRINT CENTRAL
Y	Y	Y	N	Y	N

The PRINT LOCAL WITHOUT SAVE option is only available when printing a blank template.

The PRINT AND SAVE options are only available when printing a document containing case or resource information.

Mailing Requirements:

Mail-To (Recipient): N/A

Mailed From (Return): N/A

Mail-back-to Address: N/A

Outgoing Envelop Type: N/A

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature: No

Post to SSP: No

2.1.5 Form/NOA Variable Population

Not applicable.

2.2 Update NA 274G, NA 274H, NA 274I stand-alone forms in the template repository Recommendation

2.2.0 Overview

The NA 274G, NA 274H and NA 274I forms currently have an attached NA Back 9 in the template repository. This effort will remove the NA Back 9 from these three forms in the template repository.

State Form/NOA: NA 274G (Revision 5/22)

State Form/NOA: NA 274H (Revision 12/20)

State Form/NOA: NA 274I (Revision 7/21)

Programs: CalWORKs

Attached Forms: NA Back 9

Forms Category: Forms

Template Repository Visibility: All Counties

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

2.2.1 Form Verbiage

This effort will remove the NA Back 9 from these three forms in the template repository.

Note: The NOAs and Packets that use the NA 274 budgets are not affected by this change.

2.2.2 Form Variable Population

There are no changes to this section.

2.2.3 Form Generation Conditions

There are no changes to this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	NA 274J Mockup	NA_274J_Arabic.pdf NA_274J_Armenian.pdf NA_274J_Cambodian.pdf NA_274J_Chinese.pdf NA_274J_English.pdf NA_274J_Farsi.pdf NA_274J_Hindi.pdf NA_274J_Hmong.pdf NA_274J_Japanese.pdf NA_274J_Korean.pdf NA_274J_Lao.pdf NA_274J_Mien.pdf NA_274J_Punjabi.pdf NA_274J_Russian.pdf NA_274J_Spanish.pdf NA_274J_Tagalog.pdf NA_274J_Thai.pdf NA_274J_Ukrainian.pdf NA_274J_Vietnamese.pdf

4 REQUIREMENTS

4.0 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.6 CAR- 1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	Add NA 274J into CalSAWS

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-279181

Add NA 692 to Template Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramon Villarreal-Leal
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/12/2024	1.0	Initial Draft	Ramon Villarreal-Leal

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1 OVERVIEW

This SCR is to add the NA 692 (9/23) form into the Template Repository.

1.1 Current Design

Currently the NA 692 form does not exist in CalSAWS.

1.2 Requests

Add the newest State version of the NA 692 to Template Repository.

1.3 Overview of Recommendations

1. Add the NA 692 (9/23) in English, Spanish, Chinese, and Armenian into the Template Repository.

1.4 Assumptions

1. The NA 692 form is only added in English, Spanish, Armenian, and Chinese. Any other threshold language will be implemented in a future SCR once they've been provided by CDSS.
2. Automation for the NA 692 will be implemented with CA-280015

2 RECOMMENDATIONS

2.1 Adding new NA 692 (9/23) Form Recommendation

2.1.1 Overview

The NA 692 form is be added into the Template Repository.

State Form: NA 692 (9/23)

Programs: Cash Assistance Program for Immigrants (CAPI)

Attached Form(s): N/A

Forms Category: Forms

Template Repository Visibility: All Counties

Languages: English, Spanish, Chinese, and Armenian

2.1.2 Form Verbiage

Create NA 692 Form XDP

The NA 692 form will have the following:

Form Header: CalSAWS Standard Header (Header_1)

Form Title (Document List Page Displayed Name): Notice of Change Cash Assistance Program for Immigrants (CAPI)

Form Number: NA 692

Include NA Back 9: Yes

Imaging Form Name: Notice of Change - CAPI

Imaging Document Type: CAPI

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form Variable Population

Form Header Variables: Populates standard header variable.

There is no variable population logic for the form.

2.1.4 Form Generation Conditions

1. Add Form to Template Repository

The NA 692 Form will be added to Template Repository.

Required Document Parameters: Case Number, Customer Name, Language, Program

2. Add Form Control

The NA 692 will have the following form control:

Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.

3. Add Form Print and Mailing Options

The following Print Options will be included for the NA 692 Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:

Mail-To (Recipient): Person selected from document parameters

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard envelope

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: No

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	CalSAWS	NA 692 Mockup	NA_692.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	Add the NA 692 form into the Template Repository



California Statewide Automated Welfare System

Design Document

CA-279502 Add WTW 27 as a continuation page
to NA 845

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Justin Bourbonniere, Shining Liu
	Reviewed By	Gingko Luna

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/21/2024	1.0	Original	Justin Bourbonniere, Shining Liu
06/26/2024	1.1	BA Review feedback: Add assumptions 4,5,6	Justin Bourbonniere
07/09/2024	1.2	Region 6 Feedback	Justin Bourbonniere

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1 OVERVIEW

This effort will add WTW 27 as a continuation page to NA 845 and replace the form trigger in PB00C898 to send the NA 845/WTW 27 as a set with a form trigger to send the NA 845.

1.1 Current Design

Currently CalSAWS is not generating WTW 27 as a continuation page to NA 845. Batch triggers WTW 27 as a separate form which is mailed out as a bundle with NA 845.

1.2 Requests

1. Include WTW 27 as a continuation page to NA 845 in English and all languages in the Template Repository. If NA 845 has a translation present in CALSAWS that WTW 27 does not have, use the English version of WTW 27 in that case.
2. Replace the form trigger in PB00C898 to send the NA 845/WTW 27 as a set with a form trigger to send the NA 845.

1.3 Overview of Recommendations

1. Include WTW 27 as a continuation page to NA 845 in English and all languages in the Template Repository. If NA 845 has a translation present in CALSAWS that WTW 27 does not have, use the English version of WTW 27 in that case.
2. Replace the form trigger in PB00C898 to send the NA 845/WTW 27 as a set with a form trigger to send the NA 845.

1.4 Assumptions

1. This SCR will be implemented after CA-271404 and will include the updates from that SCR.
2. NA 845 form is already posted to the Self-Service Portal. Therefore, no change is needed to make the form available to BenefitsCal.
3. Section 2.1 will make the updated form available for online trigger and batch generation. No additional effort is needed for this request.
4. The GEN 1365 will be included at Central Printing with the forms when mailed out and no translations is available.
5. NA 845 existing online page association will not be changed in this effort.
6. WTW 27 existing online page association will not be changed in this effort.
7. The existing functionality to trigger the NA 845 with the WTW 27 as a continuation page will not change with this SCR. The batch generation is changing due to WTW 27 being added to the NA 845, however the functionality will remain the same.

2 RECOMMENDATIONS

2.1 Client Correspondence - Add WTW 27 to NA 845 in the Template Repository

2.1.1 Overview

Add WTW 27 (10/03) as a continuation page to the NA 845 in the Template Repository.

State Form: NA 845 (3/14)

Programs: CalWORKs, Welfare to Work, Refugee Employment Program

Attached Forms: NA Back 9, NA 200

Forms Category: Form

Template Repository Visibility: All Counties

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

2.1.2 Form Verbiage

Update NA 845 XDP

Add WTW 27 as a continuation page to the NA 845. If NA 845 is present in a translation that WTW 27 does not have, attach the English version of WTW 27. For Arabic, Farsi, Hmong and Lao translations of NA 845 the English version of WTW 27 will be attached as these translations are not available for WTW 27.

Form Header: CalSAWS Standard Header (HEADER_1)

Include NA Back 9: Yes

Form Mockups/Examples: Supporting Documents #1

2.1.3 Form Generation Conditions

Section 2.2 updates the batch generation conditions of the NA 845 & WTW 27 set.

2.2 Batch – Update NA 845 form trigger for PB00C898

2.2.1 Overview

Replace the form trigger in PB00C898 for the NA 845 and WTW 27 set with a form trigger for NA 845.

2.2.2 Description of Change

1. Replace the form trigger in PB00C898 for the NA 845 and WTW 27 set with a trigger for NA 845. Replace any other references to the NA 845 and WTW 27 set with NA 845.

2.2.3 Partner Integration Testing

No.

2.2.4 Execution Frequency

No change.

2.2.5 Key Scheduling Dependencies

No change.

2.2.6 Counties Impacted

LA only.

2.2.7 Category

No change.

2.2.8 Data Volume/Performance

N/A

2.2.9 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence – Forms	NA 845 mockup	NA845_mockup.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11 CAR-1247	The CalSAWS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	Add WTW 27 as a continuation page to NA 845.



California Statewide Automated Welfare System

Design Document

CA-279576

Add Pregnancy and the Pregnancy special Needs
(PSN) Payment NOAs to Template Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Harshitha Bhat
	Reviewed By	Nagesha Ds

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/24/2024	1.0	Initial Draft	Harshitha Bhat

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1 OVERVIEW

The purpose of this SCR is to add M44-211L (9/23), M44-211O (9/23), M44-211N (9/23), M82-820D (9/23) in English and available threshold languages to CalSAWS Template Repository.

1.1 Current Design

Currently below mentioned forms are not available in the CalSAWS Template Repository.

1. M44-211L (9/23) - Approve Pregnancy Special Needs Payment
2. M44-211O (9/23) - Discontinue Pregnancy Special Needs Payment for Pregnant Person Only Assistance Unit
3. M44-211N (9/23) - Discontinue Pregnancy Special Needs Payment
4. M82-820D (9/23) - Discontinue Cash Aid for Pregnant Person Only Assistance Unit

1.2 Requests

1. Add the M44-211L (9/23) in English and available threshold languages to CalSAWS Template Repository.
Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.
2. Add the M44-211O (9/23) in English and available threshold languages to CalSAWS Template Repository.
Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.
3. Add the M44-211N (9/23) in English and available threshold languages to CalSAWS Template Repository.
Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.
4. Add the M82-820D (9/23) in English and available threshold languages to CalSAWS Template Repository.
Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.
5. NA 200 Budget is not available in below additional threshold languages.
Add NA 200 budget in the missing threshold languages.
Languages Include: Japanese, Mein, Thai, Ukrainian, Hindi and Punjabi.

1.3 Overview of Recommendations

1. Add the M44-211L (9/23) in English and available threshold languages to CalSAWS Template Repository.

Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.

2. Add the M44-211O (9/23) in English and available threshold languages to CalSAWS Template Repository.

Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.

3. Add the M44-211N (9/23) in English and available threshold languages to CalSAWS Template Repository.

Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.

4. Add the M82-820D (9/23) in English and available threshold languages to CalSAWS Template Repository.

Languages Include: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein.

5. NA 200 Budget is not available in below additional threshold languages.

Add NA 200 budget in the missing threshold languages.

Languages Include: Japanese, Mein, Thai, Ukrainian, Hindi and Punjabi.

1.4 Assumption

1. There is no variable population with this effort. (aside from the standard header and footer information).
2. All fields (blank or prepopulated) will be editable.
3. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add M44-211L to the CalSAWS Template Repository.

2.1.1 Overview

This effort will add the M44-211L (9/23) in English and available threshold languages in CalSAWS.

State Form: M44-211L (9/23)

Programs: CalWORKs, RCA

Attached Forms: N/A

Template Description: Approve Pregnancy Special Needs Payment

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

2.1.2 Form Verbiage

Create M44-211L XDP:

A new XDP will be created for the M44-211L (9/23) in English and threshold languages.

Threshold Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Number: M44-211L - NA 200

Form Title (Document List Page Displayed Name): Approve Pregnancy Special Needs Payment

Include NA Back 9: Yes

Imaging Form Name: Approve Pregnancy Special Needs Payment

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #1

2.1.3 Form Generation Conditions

1. Add M44- 211L (9/23) to Template Repository

The M44-211L (9/23) is added only to the Template Repository.

Required Document Parameters: Customer Name, Case Number, Program, Language

2. Add Form Control

Add an imaging barcode for M44-211L.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M44-211L.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for M44 – 211L
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for M44-211L Form
Post to Self-Service Portal	Y

2.2 Add M44-211N to the CalSAWS Template Repository.

2.2.1 Overview

This effort will add the M44-211N (9/23) in English and available threshold languages in CalSAWS.

State Form: M44-211N (9/23)

Programs: CalWORKs, RCA

Attached Forms: N/A

Template Description: Discontinue Pregnancy Special Needs Payment

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

2.2.2 Form Verbiage

Create M44-211N XDP:

A new XDP will be created for the M44-211N (9/23) in English and threshold languages.

Threshold Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Number: M44-211N - NA 200

Form Title (Document List Page Displayed Name): Discontinue Pregnancy Special Needs Payment

Include NA Back 9: Yes

Imaging Form Name: Discont Pregnancy Special Needs Payment

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #2.

2.2.3 Form Generation Conditions

1. Add M44- 211N (9/23) to Template Repository

The M44-211N (9/23) is added only to the Template Repository.

Required Document Parameters: Customer Name, Case Number, Program, Language

2. Add Form Control

Add an imaging barcode for M44-211N.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M44-211N form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for M44 – 211N
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for M44-211N Form
Post to Self-Service Portal	Y

2.3 Add M44-211O to the CalSAWS Template Repository.

2.3.1 Overview

This effort will add the M44-211O (9/23) in English and available threshold languages in CalSAWS.

State Form: M44-211O (9/23)

Programs: CalWORKs, RCA

Attached Forms: N/A

Template Description: Discontinue Pregnancy Special Needs Payment for Pregnant Person Only Assistance Unit

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

2.3.2 Form Verbiage

Create M44-211O XDP:

A new XDP will be created for the M44-211O (9/23) in English and threshold languages.

Threshold Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Number: M44-211O - NA 200

Form Title (Document List Page Displayed Name): Discontinue Pregnancy Special Needs Payment for Pregnant Person Only Assistance Unit

Include NA Back 9: Yes

Imaging Form Name: Discont Pregnancy Special Needs Payment

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #3

2.3.3 Form Generation Conditions

1. Add M44-211O (9/23) to Template Repository

The M44-211O (9/23) is added only to the Template Repository.

Required Document Parameters: Customer Name, Case Number, Program, Language

2. Add Form Control

Add an imaging barcode for M44-211O.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M44-211O form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for M44 – 211O
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for M44-211O Form
Post to Self-Service Portal	Y

2.4 Add M82-820D to the CalSAWS Template Repository.

2.4.1 Overview

This effort will add the M82-820D (9/23) in English and available threshold languages in CalSAWS.

State Form: M82-820D (9/23)

Programs: CalWORKs, RCA

Attached Forms: N/A

Template Description: Discontinue Cash Aid for Pregnant Person Only Assistance Unit

Forms Category: NOA

Template Repository Visibility: All Counties

Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

2.4.2 Form Verbiage

Create M82-820D XDP:

A new XDP will be created for the M82-820D (9/23) in English and threshold languages.

Threshold Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao, Hmong, Hindi, Ukrainian, Punjabi, Japanese, Thai, and Mein

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Number: M82-820D - NA 290

Form Title (Document List Page Displayed Name): Discontinue Cash Aid for Pregnant Person Only Assistance Unit

Include NA Back 9: Yes

Imaging Form Name: Discont Cash Aid Pregnant Person Only AU

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See supporting document #4.

2.4.3 Form Generation Conditions

1. Add M82-820D (9/23) to Template Repository

The M82-820D (9/23) is added only to the Template Repository.

Required Document Parameters: Customer Name, Case Number, Program, Language

2. Add Form Control

Add an imaging barcode for M82-820D.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for M82-820D form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for M82-820D
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for M82-820D Form
Post to Self-Service Portal	Y

2.5 Add NA 200 Budget in Threshold languages.

2.5.1 Overview

This effort will add NA 200 Budget in Japanese, Mein, Thai, Ukrainian, Hindi, and Punjabi languages.

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

2.5.2 Form/NOA Verbiage

Create NA 200 Budget xdfs in Threshold languages.

Languages include: Japanese, Mein, Thai, Ukrainian, Hindi and Punjabi.

NOA Mockups/Examples: See Supporting Documents #5

2.5.3 Form/NOA Variable Population

N/A

2.5.4 Form/NOA Generation Conditions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	M44-211L (9/23)	M44-211L_English.pdf M44-211L_Spanish.pdf M44-211L_Arabic.pdf M44-211L_Armenian.pdf M44-211L_Cambodian.pdf M44-211L_Chinese.pdf M44-211L_Farsi.pdf M44-211L_Hindi.pdf M44-211L_Hmong.pdf M44-211L_Japanese.pdf M44-211L_Korean.pdf M44-211L_Lao.pdf M44-211L_Mein.pdf M44-211L_Punjabi.pdf M44-211L_Russian.pdf M44-211L_Tagalog.pdf M44-211L_Thai,.pdf M44-211L_Ukrainian.pdf M44-211L_Vietnamese.pdf

2	Correspondence	M44-211N (9/23)	M44-211N_English.pdf M44-211N_Spanish.pdf M44-211N_Arabic.pdf M44-211N_Armenian.pdf M44-211N_Cambodian.pdf M44-211N_Chinese.pdf M44-211N_Farsi.pdf M44-211N_Hindi.pdf M44-211N_Hmong.pdf M44-211N_Japanese.pdf M44-211N_Korean.pdf M44-211N_Lao.pdf M44-211N_Mein.pdf M44-211N_Punjabi.pdf M44-211N_Russian.pdf M44-211N_Tagalog.pdf M44-211N_Thai,.pdf M44-211N_Ukrainian.pdf M44-211N_Vietnamese.pdf
3	Correspondence	M44-211O (9/23)	M44-211O_English.pdf M44-211O_Spanish.pdf M44-211O_Arabic.pdf M44-211O_Armenian.pdf M44-211O_Cambodian.pdf M44-211O_Chinese.pdf M44-211O_Farsi.pdf M44-211O_Hindi.pdf M44-211O_Hmong.pdf M44-211O_Japanese.pdf M44-211O_Korean.pdf M44-211O_Lao.pdf M44-211O_Mein.pdf M44-211O_Punjabi.pdf M44-211O_Russian.pdf M44-211O_Tagalog.pdf M44-211O_Thai,.pdf

			M44-211O_Ukrainian.pdf M44-211O_Vietnamese.pdf
4	Correspondence	M82-820D (9/23)	M82-820D_English.pdf M82-820D_Spanish.pdf M82-820D_Arabic.pdf M82-820D_Armenian.pdf M82-820D_Cambodian.pdf M82-820D_Chinese.pdf M82-820D_Farsi.pdf M82-820D_Hindi.pdf M82-820D_Hmong.pdf M82-820D_Japanese.pdf M82-820D_Korean.pdf M82-820D_Lao.pdf M82-820D_Mein.pdf M82-820D_Punjabi.pdf M82-820D_Russian.pdf M82-820D_Tagalog.pdf M82-820D_Thai,.pdf M82-820D_Ukrainian.pdf M82-820D_Vietnamese.pdf
5	Correspondence	NA 200	NA200_Mein.pdf NA200_Punjabi.pdf NA200_Hindi.pdf NA200_Japanese.pdf NA200_Thai.pdf NA200_Ukrainian.pdf

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"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>M44-211L, M44-211N, M22-211O and M82-820D are being added in English and all available languages to the CalSAWS template repository.</p>



California Statewide Automated Welfare System

Design Document

CA-280061

Placer County - Opt into the GA/GR End Date
Worker Assignment Batch Job

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti
	Reviewed By	Edgars Reinholds

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/16/2024	1.0	Initial Design	Howard Suksanti

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1 OVERVIEW

1.1 Current Design

Currently CalSAWS is not removing worker ID from General Relief Immediate Need Program for Placer County.

Below table is the current logic for Placer County.

Program	Program Status	Program Status Reason	Rules
All Programs excluding the following Medi-Cal, WTW, REP, GROW, GAGR Immediate Need, and Cal-Learn	Discontinued, Deregistered	All Program Status Reasons excluding 'Exempt'	End-date worker assignment after 1 full calendar month of the Program status begin date (effective date). Note: If a program is closed effective in the middle of the month, then the worker will remain assigned for the remainder of the current month throughout the following month. The worker assignment will be end-dated when the job runs for the first time after the following month.
All Programs excluding the following WTW, REP, GROW, GAGR Immediate Need, and Cal-Learn	Denied	All Program Status Reasons excluding 'Exempt'	End-date worker assignment 31 days after the Denial creation/action date.

1.2 Requests

Placer is requesting to opt the GA/GR Immediate Need program into the End date Worker Assignment job.

1.3 Overview of Recommendations

Opt-in Placer County into the GA/GR Immediate Need program in the End date Worker Assignment job.

1.4 Assumptions

1. The logic for the End date Worker Assignment job PB00M100 will not be changed on other programs that is not General Relief Immediate Need.
2. The first batch (PB00M100) run after the implementation date will remove worker from General Relief Immediate Need programs that are Discontinued, Deregistered, or Denied older than the specified date in the rule.

2 RECOMMENDATIONS

2.1 Opt-in Placer County to the General Relief Immediate Need rule

2.1.1 Overview

Opt-in Placer County to the General Relief Immediate Need End date Worker Assignment logic.

2.1.2 Description of Change

Opt-in Placer County to the General Relief Immediate Need End date Worker Assignment logic based on the configuration table (Table 1)

Table 1-End date worker assignment county configuration

Program	Program Status	Program Status Reason	Rules
GAGR Immediate Need	Discontinued, Deregistered	All Program Status Reasons excluding 'Exempt'	End-date worker assignment after 1 full calendar month of the Program status begin date (effective date). Note: If a program is closed effective in the middle of the month, then the worker will remain assigned for the remainder of the current month throughout the following month. The worker assignment will be end-dated when the job runs for the first time after the following month.
GAGR Immediate Need	Denied	All Program Status Reasons excluding 'Exempt'	End-date worker assignment 31 days after the Denial creation/action date.

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

Placer

2.1.6 Category

Core

2.1.7 Data Volume/Performance

The anticipated average number of records processed is between 15,000 – 20,000 per day. Please note that this is an approximation, and the number of records may vary.

2.1.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.7.1.1	The LRS shall support individual cases assigned to multiple files and to multiple workers, as specified by COUNTY-defined program and policy. Some of these workers continue to provide services and	The End date Worker Assignment job will be updated to configurable by county and

	support to a client after the traditional cash benefits, Food Stamp, and/or Medi-Cal cases have been closed.	program when a worker assignment is to be end dated.
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California Statewide Automated Welfare System

Design Document

CA-280477

Update SLO GAGR Eligibility for Non-Citizens
Paroled 1 year or more to be Eligible for Benefits

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sridhar Mullapudi
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/16/2024	1.0	Initial Draft	Sridhar Mullapudi

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1 OVERVIEW

1.1 Current Design

GAGR Automated Solution participants paroled 1 year or more are not eligible for benefits in SLO county.

1.2 Requests

GAGR Automated Solution participants paroled 1 year or more are eligible for benefits in SLO county.

1.3 Overview of Recommendations

1. Update GAGR Automated Solution participants paroled 1 year or more to be eligible for benefits in SLO county.

1.4 Assumptions

1. None

2 RECOMMENDATIONS

2.1 Update GAGR Eligibility for SLO County

2.1.1 Overview

Update GAGR Automated Solution participants paroled 1 year or more to be eligible for benefits in SLO county.

2.1.2 Description of Changes

1. Update GAGR eligibility for SLO county participants with the below document type and section code with Parolee type '**1 year or more**' to be eligible for benefits.

INS Document Code	INS Section Code	Eligibility
I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code	M93	Eligible
I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code	U4U	Eligible
I-151, I-551, Passport or I-94 Annotated with I-551 & Section Code	UHP	Eligible
I-512	212(d)(5)	Eligible
I-688B or I-765 or I-766	274a.12(a)(4) or A4	Eligible
I-688B or I-765 or I-766	274a.12(c)(11) or C11	Eligible
I-688B or I-765 or I-766	C11	Eligible
I-94	212(d)(5)	Eligible
I-94	212(d)(5) or 8 U.S.C. § 1182(d)(5)	Eligible
I-94	212(d)(5)(A) DT	Eligible
I-94	212(d)(5)(A) OAR	Eligible
I-94	212(d)(5)(A) OAW	Eligible
I-94	212.5(b)	Eligible
I-94	G-639	Eligible
I-94	Humanitarian Parolee	Eligible
I-94	Paroled Pursuant to 212(d)(5)	Eligible
I-94	Public Interest Parolee	Eligible

2.1.3 Programs Impacted

GAGR Automated Solution

2.1.4 Performance Impacts

None

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	GAGR EDBC shall determine parolee eligibility accurately for SLO county.

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-280580

Phase 1: ITOM Discovery Phase

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Debesish Banerjee, Kristina Carter, Kumaresan Govindasamy,
	Reviewed By	Faizan Durrani, Martin Sordilla, Deepak Shrivastav, Sumeet Patil

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

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1 OVERVIEW

The ITOM Discovery phase of SCR CA-280580 will improve the processes for populating CI information from multiple sources into the CalSAWS Configuration Management Database (CMDB) in ServiceNow.

1.1 Current Design

The CalSAWS CMDB in ServiceNow collects information from the following sources:

- SolarWinds – monitors CalSAWS Network Gear Devices
- Project Microsoft System Center Configuration Manager (SCCM) – monitors CalSAWS Project Windows Servers and CalSAWS Project PC Workstations
- County Microsoft System Center Configuration Manager (SCCM) – monitors Managed Counties' Windows Servers and Managed Counties' PC Workstations
- AWS Aggregator – aggregates data from CalSAWS AWS resources
- Manual import – CalSAWS Project Linux Servers

For Network Gear devices, a SQL query extracts and compiles a daily data extract of Network Gear device information from SolarWinds into a CSV report. The CSV report is emailed as an attachment to ServiceNow. In ServiceNow, an inbound email action triggers execution of a scheduled import of the email attachment. Then ServiceNow loads that data using IntegrationHub ETL Transform Maps into CMDB Network Gear classes of the CMDB.

Similarly, for Windows Servers & PC Workstations, SQL queries extract and compile daily data extracts of Windows Servers & PC Workstations from the Project SCCM and the Managed County SCCM. The CSV reports are emailed as attachments to ServiceNow. In ServiceNow, an inbound email action triggers execution of scheduled imports of the email attachments. Then ServiceNow loads that data using IntegrationHub ETL Transform Maps into Windows Server & PC Workstations classes of the CMDB.

For AWS resources, the AWS Service Management Connector in ServiceNow is integrated with AWS Aggregator. This connector collects AWS resources data from the AWS Aggregator and loads the data into AWS Resource classes in the CMDB. The Connector pulls delta AWS data every 30 minutes from AWS Aggregator and loads CMDB AWS classes. The connector also pulls full AWS data from AWS Aggregator every 12 hours and loads CMDB AWS classes.

CalSAWS Project Linux Server data provided by the Linux Team was manually loaded into the CMDB by the ServiceNow team and can be manually updated as needed.

1.2 Requests

- Use ServiceNow IT Operations Management (ITOM) Discovery to automatically populate the CMDB with up-to-date discovered data using service graph connectors, for the following classes: Network Gear devices, Windows Servers (managed county and project), PC workstations (managed county and project), and AWS resources.
- Use ServiceNow IT Operations Management (ITOM) Discovery to automatically populate the CMDB with up-to-date discovered data using horizontal discovery for the Project Linux server class
- These implementations will put CalSAWS on track to address the POAMs POAM0001755 and POAM0001444 and align with NIST Rev5.

1.3 Overview of Recommendations

Update the process for collecting CMDB data to use service graph connectors or horizontal discovery instead of emailed CSV reports or manual entry.

Service Graph Connectors are pre-defined integrations that ingest data into the Configuration Management Database (CMDB) from sources like SolarWinds and SCCM.

The Service Graph Connectors manage the configuration data pipeline in the following steps:

1. Ingest the data by identifying class, attribute, and data sources by using the identification rules
2. Standardize the data to comply with CMDB
3. Reconcile the data into a single coherent picture by using the reconciliation rules.
4. Ingest the data into CMDB.

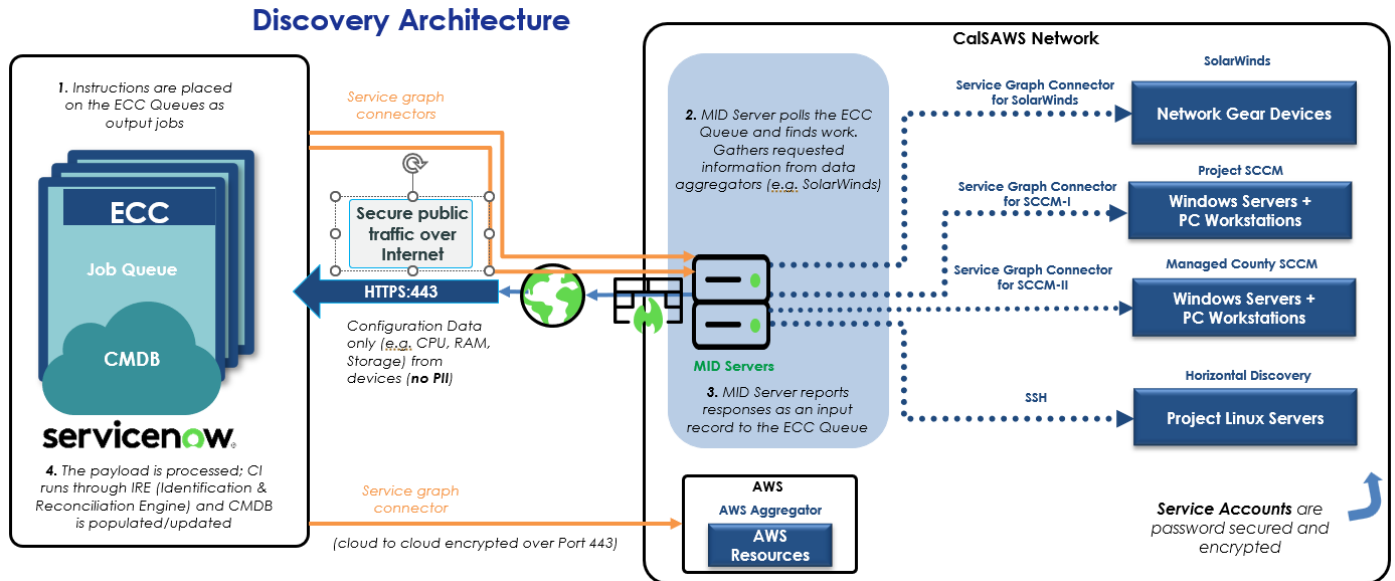
Horizontal discovery is a technique that Discovery uses to scan a network, find devices (Linux servers in the case), and then populate the CMDB with the CIs it finds.

Recommendations:

- Configure the following service graph connectors from ServiceNow:
 - Service Graph Connector for SolarWinds
 - Service Graph Connector for SCCM (for managed county SCCM instance)
 - Service Graph Connector for SCCM (for Project SCCM instance)
 - Service Graph Connector for AWS
- Setup horizontal discovery for Project Linux servers
- Manually import the defined business applications into Business Applications (cmdb_ci_business_app) table in ServiceNow (see section 11.0 for the list of business applications)
- Configure CMDB Health dashboards and reports
- Validate existing data certification methods against updated CMDB data population methods and configure as needed

The ITOM Discovery phase has no impact to county processes and no action is required from the counties for this implementation.

2 DISCOVERY ARCHITECTURE



Service Graph Connectors will connect from ServiceNow to the following applications in the CalSAWS Network via Management, Instrumentation, and Discovery servers (MID servers):

- SolarWinds
- CalSAWS Project SCCM instance
- Managed County SCCM instance

For horizontal discovery for Linux Servers, MID Servers hosted in the Equinix Data Center will scan internal subnets to detect the CIs on the network for the Linux Servers.

The Service Graph Connector for AWS does not require a MID server because it is a cloud-to-cloud encrypted connection.

The MID Servers will use an outbound connection to the ServiceNow cloud using Port 443 to send configuration data collected from SolarWinds, the SCCM instances databases, and the horizontal discovery scan results.

The details of the MID Servers are listed in Section 2.8 below.

2.1 SolarWinds

In CalSAWS, SolarWinds monitors the Network Gear Devices. The SolarWinds application is hosted in the account coreapp-production-network (us-west-2). For ServiceNow to connect to SolarWinds, it requires a MID Server, which will be deployed where it has access to the SolarWinds application using a Port 443 connection. The MID Server will be installed in an EC2 VM instance.

2.2 CalSAWS Project SCCM

The CalSAWS Project SCCM instance is hosted in the CalSAWS Network. ServiceNow will connect to the Project SCCM using another MID Server through a JDBC connection to the SCCM SQL Database using a Port 1433 connection. This MID Server will also be installed in the EC2 VM instance mentioned above.

2.3 Managed County SCCM

The Managed County SCCM instance is hosted in the on-prem Equinix Data Center. ServiceNow will connect to the Managed County SCCM instance using another MID Server through a JDBC connection to the SCCM SQL Database using a Port 1433 connection. This MID Server will be installed in a VM provisioned in the Equinix Data Center (DC).

2.4 AWS

The Service Graph Connector for AWS will not require a MID Server because AWS is hosted in the cloud, so it is a cloud-to-cloud connection with ServiceNow using an encrypted connection over Port 443.

2.5 Horizontal Discovery

There are 4 Linux Servers that are hosted in the Equinix Data Center. The servers' data is manually imported to the CMDB and maintained by the Linux Support team. As part of Security NIST Control requirement, all On-Prem Network devices are required to be automatically discovered. The ITOM Discovery approach for these devices is to use ServiceNow Horizontal Discovery using MID servers. This will require the subnet IP ranges where these devices are situated. These IP ranges are provided by Network Support Team, ServiceNow Horizontal Discovery will scan these Subnets and import the configuration data into CMDB via MID server. The MID server will be installed on a VM in Equinix DC.

2.6 Discovered Device Classes

These are the CI classes in the CMDB that will be discovered.

Device Type	CMDB CI Class	Source System
Windows Server	cmdb_ci_win_server	SCCM (Project Instance & Managed County Instance)
Linux Server	cmdb_ci_linux_server	Equinix Data Center (DC)
PC Workstation	cmdb_ci_pc_hardware	SCCM (Project Instance & Managed County Instance)
Network Gear	cmdb_ci_netgear	SolarWinds
IP Router	cmdb_ci_ip_router	SolarWinds
IP Switch	cmdb_ci_ip_switch	SolarWinds
IP Firewall	cmdb_ci_ip_firewall	SolarWinds
Wireless Access Point	cmdb_ci_wap_network	SolarWinds
WLAN Controller	u_wlan_controller	SolarWinds
Cloud Organizations	cmdb_ci_cloud_org	AWS
AWS Organizational Unit	cmdb_ci_aws_org_unit	AWS
Cloud Service Account	cmdb_ci_cloud_service_account	AWS
AWS Datacenter	cmdb_ci_aws_datacenter	AWS
VPCs	cmdb_ci_network	AWS
Cloud Subnets	cmdb_ci_cloud_subnet	AWS
Cloud Mgmt Network Interfaces	cmdb_ci_nic	AWS
SG-AWS Extension Attributes	sn_aws_extension_attributes	AWS
Availiability Zones	cmdb_ci_availability_zone	AWS

Device Type	CMDB CI Class	Source System
Elastic File Systems	cmdb_ci_cloud_file_service	AWS
EC2 Instances	cmdb_ci_vm_instance	AWS
Server	cmdb_ci_server	AWS
VNIC Endpoint	cmdb_ci_endpoint_vnic	AWS
Storage Mapping	cmdb_ci_storage_mapping	AWS
Block Endpoint	cmdb_ci_endpoint_block	AWS
IP Address	cmdb_ci_ip_address	AWS
Network Adapter	cmdb_ci_network_adapter	AWS
EBS Volumes	cmdb_ci_storage_volume	AWS
Storage Volume Snapshot	cmdb_ci_storage_vol_snapshot	AWS
Security Groups	cmdb_ci_compute_security_group	AWS
API Gateways	cmdb_ci_cloud_gateway	AWS
RDS Instances	cmdb_ci_cloud_database	AWS
RDS Clusters	cmdb_ci_cloud_db_cluster	AWS
Cloud Load Balancers (V2)	cmdb_ci_cloud_load_balancer	AWS
S3 Buckets	cmdb_ci_cloud_object_storage	AWS
DynamoDB Tables	cmdb_ci_dynamodb_table	AWS
Lambda Functions	cmdb_ci_cloud_function	AWS
OS Images	cmdb_ci_os_template	AWS
Hardware Type	cmdb_ci_compute_template	AWS
AWS Tags	cmdb_key_value	AWS
Cloud Resource	cmdb_ci_cmp_resource	AWS
* Software Packages	cmdb_ci_spkg	AWS
* Software Instance	cmdb_software_instance	AWS

Device Type	CMDB CI Class	Source System
** Software Installation	cmdb_sam_sw_install	AWS

Note:

* - This class is included when Software Asset Management (SAM) **is not** installed in ServiceNow

** - This class is included once Software Asset Management (SAM) **is** installed in ServiceNow

2.7 Service Accounts

Below is the list of all Service Account credentials that will be required for ITOM Discovery work. These credentials will be stored in ServiceNow Discovery Credential table and the password field is encrypted.

Service Account	Usage	Privilege	Provisioned By
SolarWinds Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to Connect to SolarWinds and fetch Network Gear device information	Read Only access to (SolarWinds Information Service (SWIS) API	Network Team
SolarWinds Service Account - Prod	ServiceNow Prod instance will use this account to Connect to SolarWinds and fetch Network Gear device information	Read Only access to (SolarWinds Information Service (SWIS) API	Network Team
Project SCCM Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to Project SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Accenture Tech Support

Service Account	Usage	Privilege	Provisioned By
Project SCCM Service Account - Prod	ServiceNow Prod instance will use this account to connect to Project SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Accenture Tech Support
Managed County SCCM Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to Managed County SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Gainwell Tech Team
Managed County SCCM Service Account - Prod	ServiceNow Prod instance will use this account to connect to Managed County SCCM and fetch Server & PC WorkStation information	Read Only db_datareader role membership	Gainwell Tech Team
AWS Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to AWS and fetch AWS Resources information	Read Only access, should be created in AWS Management Account	AWS Support
AWS Service Account – Prod	ServiceNow Prod instance will use this account to connect to AWS and fetch AWS Resources information	Read Only access, should be created in AWS Management Account	AWS Support

Service Account	Usage	Privilege	Provisioned By
Linux Server Service Account – Non-Prod	ServiceNow Non-Prod instance will use this account to connect to Linux Servers and discover Device information	SSH credential	Gainwell Tech Team
Linux Server Service Account – Prod	ServiceNow Prod instance will use this account to connect to Linux Servers and discover Device information	SSH credential	Gainwell Tech Team

2.7.1 Credential Rotation Procedures

The passwords for the accounts above will be rotated every 60 days. The ServiceNow team will submit a request to the Provisioned By group for the new password and then the ServiceNow team will update the credential in ServiceNow.

2.8 MID Server Details

These are the details for the MID servers required for ITOM Discovery work.

MID Servers

ServiceNow Instance	Connecting System	MID Server	Environment
CalSAWSDev	Solarwinds	solarwinds-mid-dev	AWS EC2 Non-Prod AWSSND401.ad.CalSAWS.ORG
CalSAWSDev	Project SCCM	projectsccm-mid-dev	
CalSAWSTest	Solarwinds	solarwinds-mid-test	
CalSAWSTest	Project SCCM	projectsccm-mid-test	
CalSAWSDev	Managed County SCCM	countysccm-mid-dev	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSTest	Managed County SCCM	countysccm-mid-test	
CalSAWSProd	Solarwinds	solarwinds-mid-prod	AWS EC2 Prod

ServiceNow Instance	Connecting System	MID Server	Environment
CalSAWSProd	Project SCCM	projectsccm-mid-prod	AWSSND101.ad.CalSAWS.ORG
CalSAWSProd	Managed County SCCM	countysccm-mid-prod	On-Prem Equinix DC Prod(VM) SV1SND101.c-iv-net
CalSAWSDev	Equinix DC Subnets	equinix-dc-hs-mid-dev1	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSDev	Equinix DC Subnets	equinix-dc-hs-mid-dev2	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSTest	Equinix DC Subnets	equinix-dc-hs-mid-test1	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSTest	Equinix DC Subnets	equinix-dc-hs-mid-test2	On-Prem Equinix DC Non-Prod(VM) SV1SND401.c-iv-net
CalSAWSProd	Equinix DC Subnets	equinix-dc-hs-mid-prod1	On-Prem Equinix DC Prod(VM) SV1SND101.c-iv-net
CalSAWSProd	Equinix DC Subnets	equinix-dc-hs-mid-prod2	On-Prem Equinix DC Prod(VM) SV1SND101.c-iv-net

Network Connection Diagrams are provided in the Appendix of this document.

3 ITOM DISCOVERY APPROACH

With the ITOM Discovery Crawl Phase, Service Graph Connector plugins will be used to collect CMDB data from the source applications.

The Service Graph Connector plugins come with built-in **Scheduled Data Import** definitions. Each of these Scheduled Data Import definitions is associated with built-in queries to extract the CMDB data from the source application's database. These predefined queries are called **Data Source** records in ServiceNow Terminology.

The Service Graph Connectors come with a set of Integration HUB ETL Robust Transform Maps. Data from the source applications is first loaded into staging tables in ServiceNow. The data is then transformed and mapped using these robust transform maps (called Robust Transform Engine (**RTE**) in ServiceNow). The data is then loaded from the staging table into ServiceNow CMDB tables. ServiceNow applies the Identification and

Reconciliation Engine (**IRE**) rules for each CMDB Class table when loading the data, which prevents duplication of records in the CMDB.

With the ITOM Discovery Phase, horizontal discovery will scan the on-prem network, find Linux Server devices, and then populate the CMDB with the Linux Server CIs it finds. The horizontal discovery scan will also collect IP addresses and device types for the devices in the on-prem network.

4 NETWORK DEVICES DISCOVERY

4.1 ServiceNow Service Graph Connector Integration with SolarWinds

- First install the Service Graph Connector for SolarWinds plugin in ServiceNow
- Then create a Service Graph Connector connection for SolarWinds (*Service Graph Connectors > Connections*)
- Scheduled Data Imports will be scheduled to run Daily to get Network Gear Device data from SolarWinds (*Service Graph Connectors > SolarWinds > Import Schedules*).
- The **SG-SolarWinds Hardware** Scheduled Data Import is the parent of the others. This parent will be set to run Daily. The “child” data imports are set to run in the order they are listed in the table below once the parent import completes.
- Each OOTB Scheduled Data Import has a Data Source specified on it (*Service Graph Connectors > SolarWinds > Data Sources*).

Data Imports for SolarWinds

Import Schedule Name	Data Source Name	CI Class in CMDB
SG-SolarWinds Hardware (parent of other imports)	SG-SolarWinds Hardware	cmdb_ci_netgear, cmdb_ci_ip_router, cmdb_ci_ip_switch, cmdb_ci_ip_firewall, cmdb_ci_wap_network, u_wlan_controller
SG-SolarWinds Network Adapter	SG-SolarWinds Network Adapter	cmdb_ci_network_adapter
SG-SolarWinds Disk	SG-SolarWinds Disk	cmdb_ci_disk
SG-SolarWinds CPU	SG-SolarWinds CPU	CPU attributes for NetGear Device Classes – cpu_name, cpu_core_thread, cpu_speed, cpu_manufacturer, cpu_core_count

SG-SolarWinds Software	SG-SolarWinds Software	cmdb_ci_spkg, cmdb_software_instance (if SAM application is not installed), cmdb_sam_sw_install (if SAM is installed)
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Each SolarWinds Data Source has the following attributes:

- *Type* = Data Stream (IntegrationHub)
- *Data Stream action* – this is what populates the data source with data
 - Each Data Stream contains a script that dictates what data to pull from SolarWinds and how to format it
- *Import Set Transformer* – dictates how to load the data from import set table to specific CMDB table

4.2 Security

A SolarWinds Service Account will be provided by Network Team and will have read access to SolarWinds Information Services (SWIS) APIs. There will be 2 separate credentials required, one for Non-Prod ServiceNow to SolarWinds connection and another one for Prod ServiceNow to SolarWinds connection. The account credentials are saved within ServiceNow and are encrypted.

4.3 Execution Frequency

With the implementation of this, the scheduled import of data from SolarWinds using the Service Graph Connector will be set to run once daily at 1:00 AM PT. In existing process, the data file in CSV format arrives as email attachment to ServiceNow at 1:00 AM PT.

4.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

4.4 Decommission Plan for Existing Operation

The Inbound Email Action "CMDB Solarwinds NetGear Data Load" will be deactivated before activating the new Scheduled Imports which use the Service Graph Connector.

SolarWinds will continue to email the CSV reports to ServiceNow. Because the inbound email action is deactivated ServiceNow will not process the data, but

the reports can be used as a backup data source in case of a connection disruption between the service graph connector and SolarWinds.

5 PROJECT WINDOWS SERVERS AND PC WORKSTATIONS DISCOVERY

5.1 ServiceNow Service Graph Connector Integration with Project SCCM

- First install the Service Graph Connector for SCCM plugin in ServiceNow
- Then create a connection to the Project SCCM instance (*Service Graph Connectors > SCCM > Connections*).
- Scheduled Data Imports will be scheduled to run Periodically to get Project Windows Server and Project PC Workstation data from the Project SCCM instance (*Service Graph Connectors > SCCM > Import Schedules*).
- Note: Project SCCM instance does not have Asset Intelligence (AI) enabled so the two "Software AI" scheduled imports will be deactivated
- The **SG-SCCM Computer Identity** Scheduled Data Import is the parent of the other Scheduled Imports for Service Graph Connection. This parent is setup with Run = Periodically and the agreed Repeat Interval. The "child" data imports are set to run in the order they are listed in the table below once the parent import completes.
- Each of these OOTB Scheduled Data Imports has a Data Source specified on it (*Service Graph Connectors > SCCM > Data Sources*).

Data Imports from Project SCCM

Import Schedule Name	Data Source Name	CI Class
SG-SCCM Computer Identity (parent of other imports)	SG-SCCM Computer Identity	cmdb_ci_win_server, cmdb_ci_pc_hardware
SG-SCCM Disk	SG-SCCM Disk	cmdb_ci_disk
SG-SCCM Operating System	SG-SCCM Operating System	Operating System attributes – os_version, os_service_pack, ram
SG-SCCM Processor	SG-SCCM Processor	CPU attributes – cpu_name, cpu_speed, cpu_type, cpu_manufacturer, OS Address width (bits), cpu_core_thread, cpu_core_count
SG-SCCM Network	SG-SCCM Network	cmdb_ci_network_adapter, cmdb_ci_ip_address
SG-SCCM Computer OU	SG-SCCM Computer OU	This data source imports data about the Organizational Unit (OU) name. The data is stored in the SG-SCCM Computer Related

		[sn_sccm_integrate_sccm_2019_computer_related] table.
SG-SCCM Software	SG-SCCM Software	cmdb_ci_spkg, cmdb_software_instance (if SAM application is not installed), cmdb_sam_sw_install (if SAM is installed)
SG-SCCM Removed Software	SG-SCCM Removed Software	This import does comparison software instance/install on ServiceNow instance with SCCM and removes those from the CMDB that are no longer in SCCM. cmdb_ci_spkg, cmdb_software_instance (if SAM application is not installed), cmdb_sam_sw_install (if SAM is installed)
SG-SCCM Last Discovered Update	SG-SCCM Last Discovered Update	This data source will run at the end of the import schedules to update the last_discovered date on the Computer CI. The source will conduct a full pull of all the computers and bring in only the ResourceID and the LastHWScan columns to update the CMDB Windows Server & PC Workstation table.

- Each SCCM Data Source has the following attributes:
 - *Type* = JDBC
 - *SQL statement* – the query that will run on the specified server, SCCM instance and database
 - *Use MID Server*
 - *Server*
 - *Instance Name*
 - *Database Name*
 - *Use last run datetime* – Controls the amount of data that is retrieved from the database during an import run. If unchecked, then all rows in the table specified are imported, every time. If checked, we can set a datetime value to limit imported data to delta values only.
 - For the first data load using these scheduled imports, Use last run datetime is set to False so that the first data load is a Full data load into the CMDB.
 - After the first run, Use last run datetime will be set to True for all data sources except for SCCM Removed Software data source
 - *Last run datetime* – The datetime value in this field is automatically populated from the database field you select below and represents

the latest value from the previous run. This value acts as a dynamic filter to restrict the number of records retrieved to those records that have changed since the data source's last runtime.

- If a full data load is requested, the Last run datetime can be cleared on all the data sources
- *Last run database field* = TimeKey (TimeKey field is set in the SQL statement)
 - Field name from the source table that will be used as the filter in the next run. This value may need to be case sensitive, depending on the target database type.

5.2 Security

For Project SCCM, Accenture Tech Support will provide the ServiceNow team the following details:

- User Name
- Password
- SCCM Host Name (Server)
- SCCM DataBase Name

These will be required to establish the JDBC connection between ServiceNow & SCCM (via MID Server). The Service Account User mentioned above will have db_datareader role membership in Project SCCM. The account credentials are saved within ServiceNow and are encrypted.

5.3 Execution Frequency

With the implementation of this, the scheduled imports of data from the Project SCCM instance using the Service Graph Connector will be set to run at the agreed upon repeat interval. In the existing process, the data files in CSV format arrive as email attachments to ServiceNow at 1:00 AM PST.

5.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

5.4 Decommission Plan for Existing Operation

The following Inbound Email Actions will be deactivated before activating the new Scheduled Imports which use the Service Graph Connector:

- CMDB SCCM Computer Identity Load
- CMDB SCCM Disk Drive Load
- CMDB SCCM Computer Processor Load

- CMDB SCCM OS RAM Load
- CMDB SCCM Network Adapter Load
- CMDB SCCM Software Data Load

The Project SCCM instance will continue to email the CSV reports to ServiceNow. Because the inbound email actions are deactivated, ServiceNow will not process the data, but the reports can be used as a backup data source in case of a connection disruption between the service graph connector and Project SCCM.

6 COUNTY WINDOWS SERVERS AND PC WORKSTATIONS DISCOVERY

6.1 ServiceNow Service Graph Connector Integration with Managed County SCCM

- Confirm the Service Graph Connector for SCCM plugin is already installed in ServiceNow
- Then create a connection to the Managed County SCCM instance (*Service Graph Connectors > SCCM > Connections*)
- The Import Schedules and Data Sources for Managed County SCCM have the same design as described above for Project SCCM, but the MID Server, Server, Instance Name and Database Name will be specific to the County SCCM instance

6.2 Security

For County SCCM, Gainwell Tech team will provide the ServiceNow team with the following details:

- User Name
- Password
- SCCM Host Name (Server)
- SCCM DataBase Name

These will be required to establish the JDBC connection between ServiceNow & SCCM (via MID Server). The Service Account User mentioned above will have db_datareader role membership in County SCCM. The account credentials are saved within ServiceNow and are encrypted.

6.3 Execution Frequency

With the implementation of this, the scheduled imports of data from the Project SCCM instance using the Service Graph Connector will be set to run at the agreed upon repeat interval. In the existing process, the data files in CSV format arrive as email attachments to ServiceNow at 7:00 AM PT.

6.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

6.4 Decommission Plan for Existing Operation

The following Inbound Email Actions will be deactivated before activating the new Scheduled Imports which use the Service Graph Connector:

- CMDB SCCM Computer Identity Load
- CMDB SCCM Disk Drive Load
- CMDB SCCM Computer Processor Load
- CMDB SCCM OS RAM Load
- CMDB SCCM Network Adapter Load
- CMDB SCCM Software Data Load

The County SCCM instance will continue to email the CSV reports to ServiceNow. Because the inbound email actions are deactivated, ServiceNow will not process the data, but the reports can be used as a backup data source in case of a connection disruption between the service graph connector and County SCCM.

7 AWS RESOURCES DISCOVERY

7.1 ServiceNow Service Graph Connector Integration with AWS Aggregator

Below is the prerequisite setup for the AWS Environment to be performed by the AWS admin to enable ServiceNow to use the Service Graph Connector Integration with AWS Aggregator:

1. AWS Config Recorder activation
2. Enable read-only IAM policies, roles, and groups for ServiceNow user to access AWS environment
3. Enable AWS Systems Manager Inventory
4. Create an instance profile to be attached with an EC2 instance

In ServiceNow, the Service Graph Connector is configured as described below.

- The ServiceNow team will create a connection for a service graph connector to AWS (*Service Graph Connectors > AWS > Connections*).
- OOTB Scheduled Data Imports will be scheduled to run Daily to get AWS resources data from the AWS aggregator (*Service Graph Connectors > AWS > Import Schedules*).
- The **SG-AWS-Organization** Scheduled Data Import is the parent of the other Scheduled Imports for Service Graph Connection. This parent is set

to Run = Daily. The “child” data imports are set to run in the order they are listed in the table below once the parent import completes.

Data Imports from AWS

Import Schedule Name	Data Sources Name	CMDB CI classes
SG-AWS-Organization (parent of the other imports)	SG-AWS-Organization	Cloud Organizations [cmdb_ci_cloud_org]
SG-AWS-Org-Units	SG-AWS-Org-Unit	AWS Organizational Unit [cmdb_ci_aws_org_unit]
SG-AWS-Service-Account	SG-AWS-Service-Account	Cloud Service Account [cmdb_ci_cloud_service_account] Cloud Organizations [cmdb_ci_cloud_org] Key Value [cmdb_key_value]
SG-AWS-Service-Account- Tags	SG-AWS-Service-Account- Tags	Cloud Service Account [cmdb_ci_cloud_service_account] Key Value [cmdb_key_value]
SG-AWS-Org-Unit- Accounts	SG-AWS-Org-Unit- Accounts	Cloud Service Account [cmdb_ci_cloud_service_account]
SG-AWS-Datacenters	SG-AWS-Datacenters	Cloud Service Account [cmdb_ci_cloud_service_account] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-VPC	SG-AWS-VPC	Cloud Service Account [cmdb_ci_cloud_service_account] Cloud Network [cmdb_ci_network] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Subnets	SG-AWS-Subnets	Availability Zone [cmdb_ci_availability_zone] Cloud Network [cmdb_ci_network] Key Value [cmdb_key_value] Cloud Subnet [cmdb_ci_cloud_subnet] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Network- Interface	SG-AWS-Network- Interface	Cloud Network [cmdb_ci_network] Cloud Subnet [cmdb_ci_cloud_subnet]

Import Schedule Name	Data Sources Name	CMDB CI classes
		Cloud Mgmt Network Interface [cmdb_ci_nic] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Security-Group	SG-AWS-Security-Group	Cloud Network [cmdb_ci_network] Compute Security Group [cmdb_ci_compute_security_group] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Storage-Volume	SG-AWS-Storage-Volume	Storage Volume [cmdb_ci_storage_volume] Storage Volume Snapshot [cmdb_ci_storage_vol_snapshot] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Image-Private	SG-AWS-Image-Private	Image [cmdb_ci_os_template]
SG-AWS-Image-Id	SG-AWS-Image-Id	Image [cmdb_ci_os_template]
SG-AWS-Hardware-Type	SG-AWS-Hardware-Type	Hardware Type [cmdb_ci_compute_template] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-EC2	SG-AWS-EC2	Virtual Machine Instance [cmdb_ci_vm_instance] Note: The following CIs are populated when populating the Virtual Machine Instance [cmdb_ci_vm_instance] CI: Server [cmdb_ci_server] VNIC Endpoint [cmdb_ci_endpoint_vnic] Storage Mapping [cmdb_ci_storage_mapping] Block Endpoint [cmdb_ci_endpoint_block] IP Address [cmdb_ci_ip_address] Network Adapter [cmdb_ci_network_adapter]

Import Schedule Name	Data Sources Name	CMDB CI classes
		Key Value [cmdb_key_value]
SG-AWS-ELB-V1	SG-AWS-ELB-V1	Cloud Load Balancer [cmdb_ci_cloud_load_balancer] Compute Security Group [cmdb_ci_compute_security_group] Availability Zone [cmdb_ci_availability_zone] SG-AWS Extension Attributes [sn_aws_extension_attributes] Key Value [cmdb_key_value] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-ELB-V2	SG-AWS-ELB-V2	Cloud Load Balancer [cmdb_ci_cloud_load_balancer] Compute Security Group [cmdb_ci_compute_security_group] Availability Zone [cmdb_ci_availability_zone] SG-AWS Extension Attributes [sn_aws_extension_attributes] Key Value [cmdb_key_value] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-RDS	SG-AWS-RDS	Cloud DataBase [cmdb_ci_cloud_database] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-API-Gateway	SG-AWS-API-Gateway	Cloud Gateway [cmdb_ci_cloud_gateway] Key Value [cmdb_key_value] SG-AWS Extension Attributes [sn_aws_extension_attributes] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Lambda	SG-AWS-Lambda	Cloud Function [cmdb_ci_cloud_function]
SG-AWS-S3	SG-AWS-S3	Cloud Object Storage [cmdb_ci_cloud_object_storage]
SG-AWS-DynamoDb	SG-AWS-DynamoDb	DynamoDB Table [cmdb_ci_dynamodb_table] SG-AWS Extension Attributes [sn_aws_extension_attributes]

Import Schedule Name	Data Sources Name	CMDB CI classes
		Key Value [cmdb_key_value] AWS Datacenter [cmdb_ci_aws_datacenter]
SG-AWS-Software-Inventory	SG-AWS-Software-Inventory	When the Software Asset Management (SAM) application isn't installed: <ul style="list-style-type: none"> Software Packages [cmdb_ci_spkg] Software Instance [cmdb_software_instance] Server [cmdb_ci_server] When the SAM application is installed (during SAM phase): <ul style="list-style-type: none"> Software Installation [cmdb_sam_sw_install] Server [cmdb_ci_server]
SG-AWS-Software-Remove	SG-AWS-Software-Remove	None. This removes software from these tables: If SAM app is not installed: <ul style="list-style-type: none"> Software Packages [cmdb_ci_spkg] Software Instance [cmdb_software_instance] If SAM app is installed: <ul style="list-style-type: none"> Software Installation [cmdb_sam_sw_install]
SG-AWS-Tags	SG-AWS-Tags	DynamoDB Table [cmdb_ci_dynamodb_table] Cloud Load Balancer [cmdb_ci_cloud_load_balancer] Cloud Function [cmdb_ci_cloud_function] Key Value [cmdb_key_value]
SG-AWS-VM-Hw-Consolidation	SG-AWS-VM-Hw-Consolidation	Virtual Machine Instance 1 [cmdb_ci_vm_instance_1] Server 1 [cmdb_ci_server_1]
SG-AWS-Generic-Resources	SG-AWS-Generic-Resources	Cloud Resource [cmdb_ci_cmp_resource] SG-AWS Extension Attributes [sn_aws_extension_attributes]

Each AWS Data Source has the following attributes:

- *Type* = Custom (Load by Script)
- *Data Loader* – OOTB script
- *Use last run datetime* – Controls the amount of data that is retrieved from the database during an import run. If unchecked, then all rows in

the table specified are imported, every time. If checked, we can set a datetime value to limit imported data to delta values only.

- For the first data load using these scheduled imports, *Use last run datetime* is set to False (unchecked) so that the first data load is a Full data load into the CMDB.
- After the first run, *Use last run datetime* will be set to True (checked) for all data sources except for AWS Removed Software data source
- *Last run datetime* – The datetime value in this field is automatically populated from the database field you select below and represents the latest value from the previous run. This value acts as a dynamic filter to restrict the number of records retrieved to those records that have changed since the data source's last runtime.
 - If a full data load is requested, the Last run datetime can be cleared on all the data sources
- *Last run database field* = TimeKey (TimeKey field is set in the SQL statement)
 - Field name from the source table that will be used as the filter in the next run. This value may need to be case sensitive, depending on the target database type.

7.2 Security

This integration will require Service Account credentials created in AWS Management Account.

- Secret Key
- Secret Access Key

7.3 Execution Frequency

The scheduled imports of data from AWS using the Service Graph Connector will be set to run Daily. In the existing process, the Service Management Connector pulls delta AWS data every 30 minutes from AWS Aggregator and loads the CMDB AWS classes. The Service Management Connector pulls Full data from the AWS Aggregator every 12 hours and loads the CMDB AWS classes.

7.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

7.4 Decommission Plan for Existing Operation

Deactivate the following Scheduled Jobs in ServiceNow:

- Sync all ServiceNow Resources to AWS Config

- Synchronize AWS Config
- Synchronize AWS Health
- Synchronize changes to all AWS accounts

8 HORIZONTAL DISCOVERY

8.1 Horizontal Discovery of On-Prem Network

ServiceNow Horizontal Discovery has 4 basic phases:

- a) Shazzam Scan - Based on the port the device is listening/responds, ServiceNow Discovery understands the device type e.g. Windows, Linux, Network Gear etc.
- b) Classification – In this phase the discovery determines which class of the OS type this device is running e.g. Windows Server 2019, Windows Server 2022 etc.
- c) Identification – In this phase, using OOB Identification & Reconciliation Rules (IRE), discovery tries to find out if there already a CI in CMDB and if so, update the CI. If no existing CI found, it creates new one.
- d) Exploration – In this final phase the discovery finds more details from the device like applications running, memory, network cards. Discovery then creates relationships between applications and devices and between applications.

Horizontal Discovery uses discovery credentials provided by device support admins to perform the Classification, Identification & Exploration phases. Without credentials, Discovery can recognize IP Address & Device Type in the scanning phase.

8.1.1 IP Range Sets

ServiceNow Horizontal Discovery is executed against a set of IP Ranges. These IP Ranges are provided by the Network Administrator for the intended discovery scanning of devices hosted in the Equinix Data Center. When the discovery is initiated manually or by a scheduled trigger, the MID server will start executing the scan for each of the IP Addresses in all IP Ranges listed in the IP Range Set. ServiceNow also has provision to exclude any discrete IP Addresses/IP Ranges from the scan. The following table details the On-Prem Network Subnets that Horizontal Discovery will scan through.

Name	Subnet Details
	67.124.173.0 255.255.255.0 (/24)

SV1 Equinix Server Subnets	100.64.99.0 255.255.255.0 (/24)
	192.168.18.0 255.255.255.0 (/24)
	192.168.26.0 255.255.255.0 (/24)
	192.168.27.0 255.255.255.0 (/24)
	192.168.32.0 255.255.255.0 (/24)
LA3 Equinix Server Subnets	67.124.162.0 255.255.255.0 (/24)
	100.64.95.0 255.255.255.0 (/24)
	192.168.65.0 255.255.255.0 (/24)
	192.168.68.0 255.255.255.0 (/24)
Managed County Server and Workstation Subnets	14.0.0.0 255.0.0.0 (/8)
Managed County Kiosks	14.15.0.0/16
	100.64.0.0/16

8.2 Security

ServiceNow Horizontal Discovery requires service accounts/credentials. These credentials are of various types such as Windows Credentials, SSH Credentials, SNMP Community Credentials, etc. It depends on the type of devices it is going to discover. To discover the Linux Servers and update CI information in CMDB, a SSH credential will be required.

8.3 Execution Frequency

Discovery Schedules will be created in ServiceNow to scan different Subnets in different schedules. Each Schedule will be tied with one or more IP Range Sets and a Mid Server / MID cluster. MID cluster is a logical grouping of MID Servers for load balancing and improved performance.

8.3.1 Key Scheduling Dependencies

The execution frequency is configurable in ServiceNow. If the data owners identify that the data should be refreshed at a different frequency, the execution frequency can be updated in ServiceNow.

8.4 Decommission Plan for Existing Operation

The existing process is manually updating records in the CMDB. There is no decommission plan required.

9 ENVIRONMENTS (CMDB_CI_ENVIRONMENT) TABLE IN SERVICENOW

Environments will be defined by the system owners and the Configuration Manager. The environments will be imported into the `cmdb_ci_environment` table as needed in ServiceNow and referenced to their respective CIs in the CMDB.

10 LOCATIONS (CMN_LOCATION) TABLE IN SERVICENOW

The locations for assets will be defined by the system owners and the Configuration Manager. These locations will be populated in the `cmn_location` table in ServiceNow.

Mandatory attributes will be made mandatory on the location form in ServiceNow (e.g. Name, Street, etc.).

11 BUSINESS APPLICATIONS

Business application is a new CMDB CI class. We create relationships between the business application and other CIs. Functionally, two applications can be integrated or connected to each other to establish a relationship between them. We can relate business applications to other infrastructural CIs like databases and web servers.

Having the business applications in the ServiceNow CMDB begins to lay the foundation for a Common Service Data Model (CSDM) at CalSAWS.

Business applications will be manually loaded into the Business Application table [`cmdb_ci_business_app`]. This project's stakeholders will define the list of business applications to be imported. The following is an initial list.

11.1 List of Business Applications

- CalSAWS Core (Online + Batch)
- LRS WebServices
- OCAT Service
- Lobby Service
- Journal Service
- Portal Service
- Task Service
- Appointment Service
- Activities Service

- Email Service
- Fiscal Service
- CalSAWS Service
- Imaging Service
- LRS Dashboard
- AMP
- Auditor
- Fileservice
- Kafka Producer Service
- Confluent - Connectors/Streams
- Kiosk/FACT 1.0
- FACT 2.0
- Lobby Monitor
- MDM (Master Data Management)
- EBT Emulator
- GAGR
- SMS Service (Serverless)
- ChildCare Portal
- IVR Services - Contact Center
- CHEWS
- Analytics
- Predictive Handling R
- OnlineHelp
- Case Copy
- VA
- RPA
- Journal MicroService
- Meds MicroService
- WDTIP

12 DATA CERTIFICATION

Data certification supports validating the CMDB for 3 the C's (Completeness, Correctness, Compliance).

- Critical attributes identified by the CI class data owners will be set as mandatory fields on CI forms in ServiceNow
- Any mandatory attribute that is empty on a CI will trigger a certification task to be created for the CI data owner group to review
- Duplicate CIs will trigger a certification task to be created for the CI data owner group to review and reconcile the duplicate CIs

12.1 Mandatory Attributes

The data owner for each CI class will provide the list of attributes to the ServiceNow team which should be mandatory for the CI class, validated by the

CalSAWS Security team. The ServiceNow team will make those fields mandatory for the CI class.

12.2 Data Certification Schedules

Data Certification Schedules will run daily in ServiceNow. The Data Certification Schedules define the CI information that requires certification and the frequency of execution. A Data Certification Schedule automatically creates a set of certification tasks, each assigned to the Support Group for the CIs within the task.

The ServiceNow Team will train the CI data owners on how to work certification tasks in ServiceNow.

12.3 CMDB Health Dashboards and Reports

The OOTB CMDB dashboards display CMDB health reports. The CMDB health KPIs and metrics that CIs are evaluated for will be configured with input from this project's stakeholders.

13 DOCUMENTATION

13.1 Knowledge Articles

- Technical documentation of service graph connector setup and horizontal discovery setup

13.2 Operational Working Documents (OWD)

During the next CalSAWS deliverables update cycle, the following plans and OWDs will be updated as needed to reflect the changes being implemented in this design.

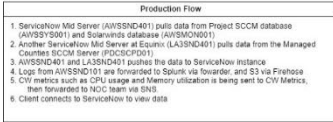
- 4.0 Configuration Management Plan
- OWD - Configuration Management Functional Processes and Procedures (OWD under 4.0 Configuration Management Plan)
- OWD - Service Asset and Configuration Mgmt Processes and Procedures (OWD under 7.0 Operations Management Plan)
- OWD - CMDB Data Validation Checklist and Process (OWD under 7.0 Operations Management Plan)

14 APPENDIX

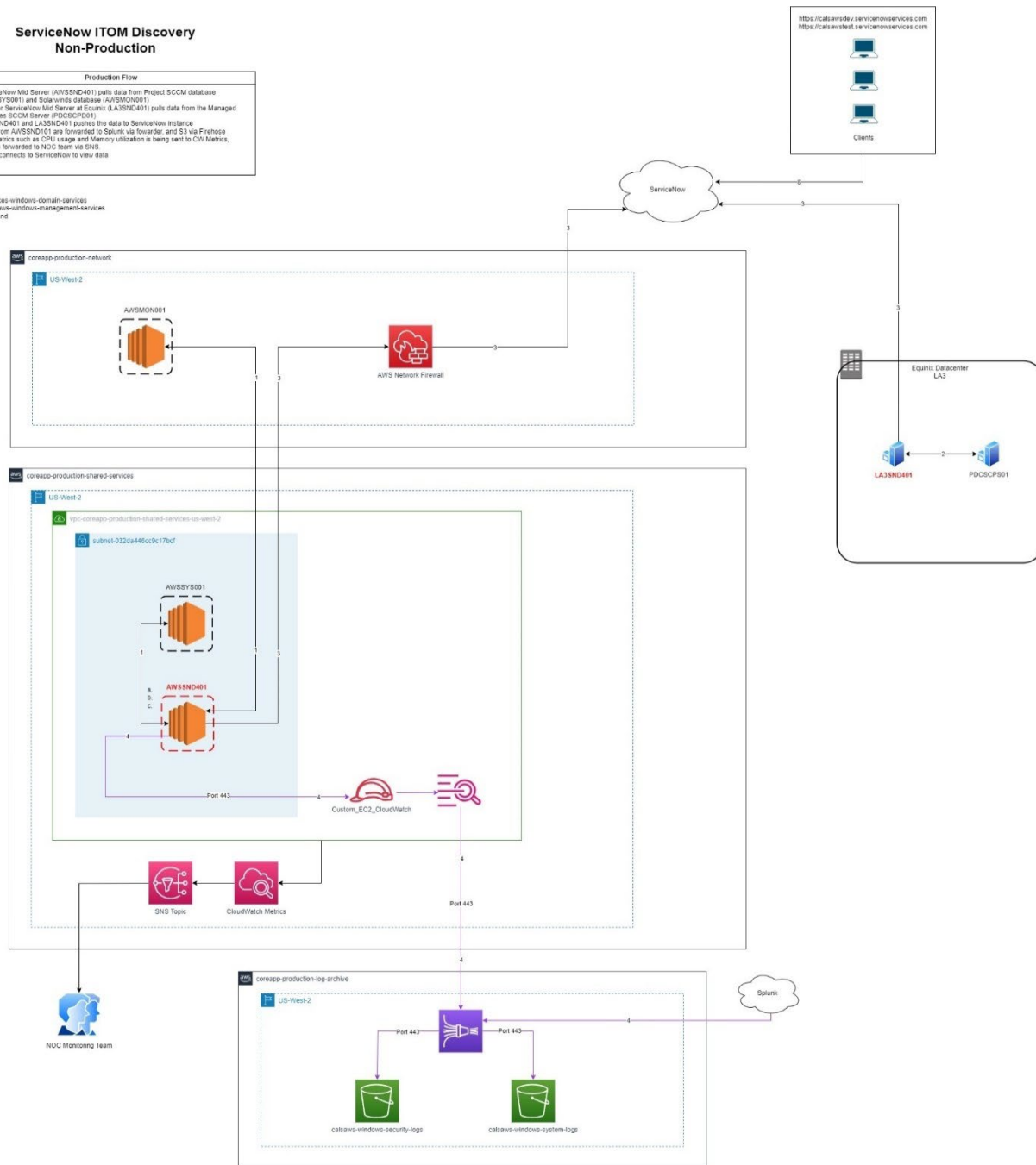
Note: the Equinix DC Server will be SV1SND101, instead of LA3SND401.

Network Connection Diagram – NonProd

ServiceNow ITOM Discovery Non-Production

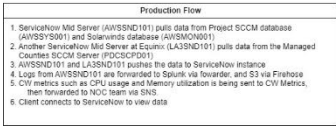


a. calaws-windos-domain-services
b. calaws-windos-managemnt-services
c. avosend

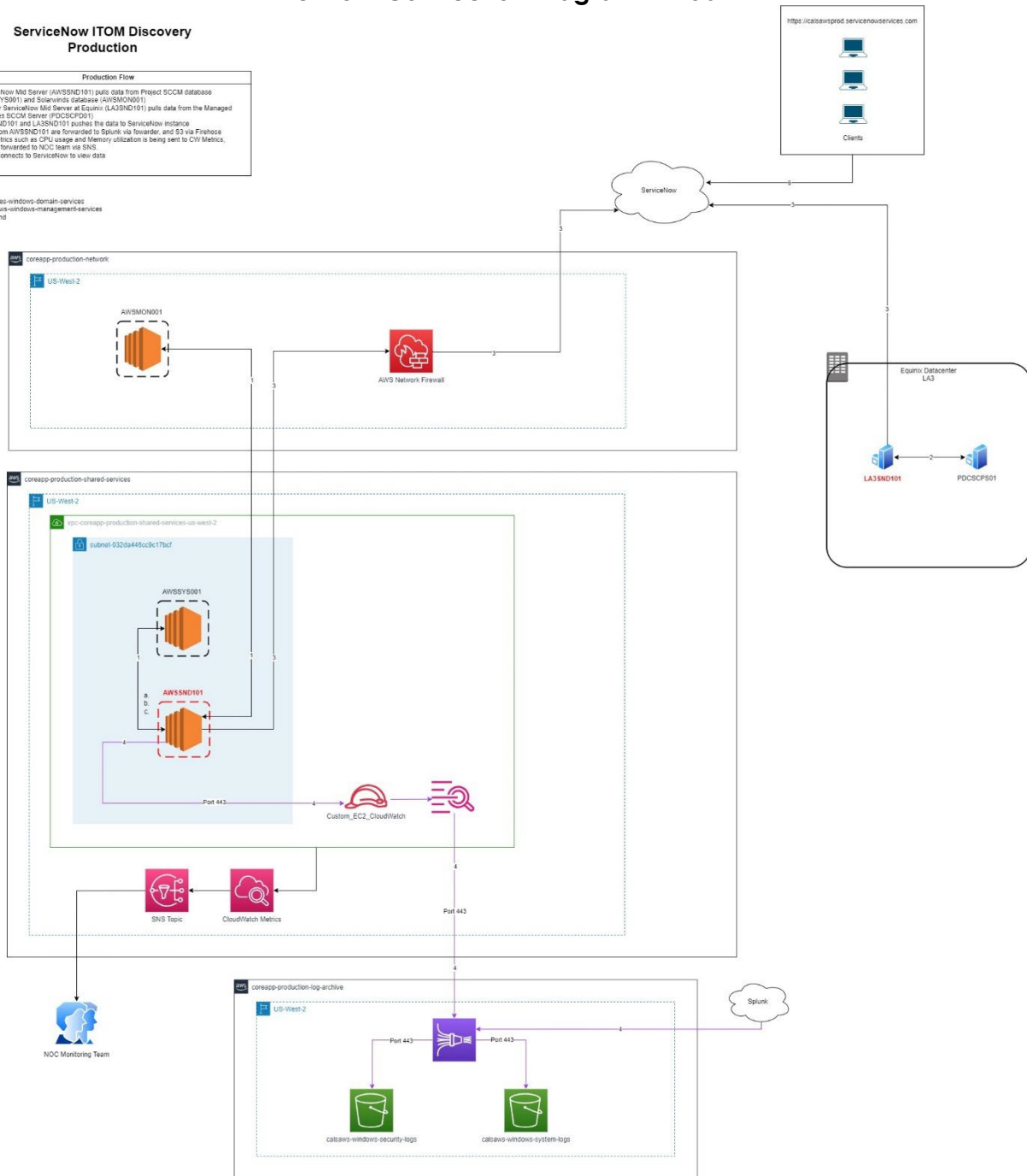


Network Connection Diagram – Prod

ServiceNow ITOM Discovery Production



a. calaws-windows-domain-services
b. calaws-windows-management-services
c. awssnd



CMDB Tables for AWS

The following CI classes will be synced through the AWS Config integration.

SNo	Name	CMDB Table
1	Accounts	cmdb_ci_cloud_service_account
2	VPC	cmdb_ci_network
3	Compute Security Groups	cmdb_ci_compute_security_group
4	EBS Volumes	cmdb_ci_storage_volume
5	API Gateway	cmdb_ci_cloud_gateway
6	Auto Scaling Group	x_126749_aws_sc_cmdb_ci_autoscaling_group
7	Ec2 Instances	cmdb_ci_vm_instance
8	Availability Zones	cmdb_ci_availability_zone
9	Cloud Mgmt Network Interfaces	cmdb_ci_nic
10	Cloud Databases	cmdb_ci_cloud_database
11	Cloud Database Cluster	cmdb_ci_cloud_db_cluster
12	Cloud Subnet	cmdb_ci_cloud_subnet
13	Cloud Load Balancers	cmdb_ci_cloud_load_balancer
14	Cloud Object Storages	cmdb_ci_cloud_object_storage
15	CloudFormation Stacks	x_126749_aws_sc_cmdb_ci_cloudformation_stack
16	DynamoDB Tables	cmdb_ci_dynamodb_table
17	Cloud Functions	cmdb_ci_cloud_function
18	Images	cmdb_ci_os_template
19	Key Values	cmdb_key_value

The Following Sections and Fields are added on the above list of Tables.

Section	Field	Data Type	Dictionary Values
Criticality and Sensitivity	Criticality Score (1 to 5)	Choice	1, 2, 3, 4,5
	Sensitivity Level (SPII, PII, SPII combined)	Choice	SPII, PII, SPII combined
	Impact Level (Impact classifications (0 to 5)	Choice	0, 1, 2, 3, 4,5

	Dependency and Interdependency (Descriptive text, Asset identifiers)	String (Medium 255 Characters)	
Operational Details	Operational Status (Live, In repair, in build, decommissioned)	This field are exists	
	Usage (Primary/Secondary functions)	Choice	Primary function and Secondary function
	Schedule	This field are exists	
	Maintenance Schedule (Time intervals, Descriptive text)	String (Medium 255 Characters)	
	Lifecycle Stage (drop down Initiate, Design, Implemented, Decommissioned)	This field are exists	
Security and Privacy Controls (255 characters)	Applied Security Controls (Security control names)	String (Medium 255 Characters)	
	Applied Privacy Controls (Privacy control names)	String (Medium 255 Characters)	
Vulnerabilities and Risks (255 characters)	Known Critical/High Vulnerabilities (CVE identifiers, Descriptive text)	String (Medium 255 Characters)	
	Risk Assessment Result (0 to 5)	Choice	0, 1, 2, 3, 4,5
	Threat Landscape (Threat categories)	String (Medium 255 Characters)	
	Last Incident History (Date, Descriptive text)	String (Medium 255 Characters)	

Audit and Monitoring (multi-line)	Monitoring Mechanisms (Monitoring tool names)	String (Medium 255 Characters)	
	Audit Logs (Log types)	String (Medium 255 Characters)	
	Access Logs (Event types)	String (Medium 255 Characters)	
	Security Event Information (Event descriptions)	String (Medium 255 Characters)	