

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-202347

Automate E-Application Status

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Dymas Pena, Cathy Vaisau, Connie Buzbee, Gillian Bendicio, Fredrick Gains

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/18/2024	0.1	Initial Version	Jennifer Muna
7/2/2024	0.2	Updated requirements per SSP Committee feedback	Jennifer Muna

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# 1 OVERVIEW

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This SCR outlines the necessary modifications to enable an automated functionality to the e-Application status on the e-Application Summary Page.

## 1.1 Current Design

The E-Application status update is a manual process when an application is received from the Self-Service Portal into CalSAWS via Application Transfer API. The worker must review, import, and/or manually update the data on the e-Data collection pages and manually update status of the e-Application to 'Transferred to System'.

## 1.2 Requests

1. Automate e-Application status by updating the status to 'Transferred to System' when the e-Application and/or program(s) is processed (Active, Denied, or Discontinued, etc.)

## 1.3 Overview of Recommendations

1. Create a new batch job to automatically update the status from 'Data Transfer' to 'Transferred to System' when EDBC for the e-Application and/or program(s) is processed (Active, Denied, or Discontinued, etc.)
2. Schedule the new batch job to run nightly Monday – Saturday.

## 1.4 Assumptions

1. All API's logic and functionality not mentioned in this SCR will remain unchanged. There is no API Swagger Documentation update with this enhancement.
2. The following scenarios of e-Applications will not apply to the automated functionality:
  - a. E-Applications that are in 'Data Transfer' where there is no EDBC ran for the elected programs.
  - b. E-Applications in 'Data Transfer' where the case has been purged.
3. The new batch job will automatically update e-Applications that are processed outside of the CalSAWS business days (Sundays and holidays).
4. Data Change Request to update existing e-Applications with status of 'Data Transfer' to 'Transferred to System' will be addressed in CA-279612.

## 2 RECOMMENDATIONS

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### 2.1 Automate E-Application Status

#### 2.1.1 Overview

The e-Application Search and e-Application Summary page display information entered by an applicant when submitted via the Self-Service Portal. The worker can edit the status of the e-Application from the e-Application Summary page. This section outlines the necessary online modifications to automatically update the status of an e-Application from 'Data Transfer' to 'Transferred to System'. [See Appendix for new e-Application status flow.](#)

#### 2.1.2 Description of Change

1. Create a new batch job that will automatically update the status of an E-Application from 'Data Transfer' to 'Transferred to System' when the following criteria are met:
  - a. Current status of e-Application is in 'Data Transfer'.
  - b. E-Application's application date is less than or equal to the batch date.
  - c. EDBC for all programs listed on e-Application, has a run date that is equal to or greater than the e-application date.
    - i. **Note:** County workers are responsible for ensuring all data are properly accepted and updated in the system prior to running EDBC.
2. Create a Journal entry for the case with the following details after successfully updating the e-Application's status:
  - a. E-App Number – The e-Application number.
  - b. Batch Date – The date of when the batch job ran.
  - c. Primary Applicant Name – The name of the primary applicant on the e-Application.

Journal Entry	Description
New/Update	Yes
Journal Category	Interfaces
Journal Type	Self Service
Short Description	E-Application Status was updated
Long Description	E-Application {e-App Number} status was updated to 'Transferred to System' on {Batch Date} for {Primary Applicant Name}.

Journal Entry	Description
Trigger Condition	When new batch job successfully updates the status of an E-App from 'Data Transfer' to 'Transferred to System'

3. Create a BSCR to schedule the new batch job to run daily Monday – Saturday.

### 2.1.3 Execution Frequency

Schedule this job to run daily Monday – Saturday on CalSAWS business days.

### 2.1.4 Key Scheduling Dependencies

N/A

### 2.1.5 Counties Impacted

All CalSAWS Counties

### 2.1.6 Category

This is a core batch job that needs to be completed by 6 a.m.

### 2.1.7 Data Volume/Performance

Approximately up to 60,000 e-Applications are received in CalSAWS from the Self-Service Portal each month.

### 2.1.8 Failure Procedure/Operational Instructions

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

## 2.2 Automated Regression Test

### 2.2.1 Overview

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above

### 2.2.2 Description of Change

1. Evaluate each system test scenario for the potential of automation.  
Known exclusionary criteria:
  - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
  - b. Technical limitations (ex., visual comparison of a static document against a template)
  - c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
  - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
  - a. Repeatability: The script must be able to execute multiple times between data refreshes
  - b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario.

### 3 REQUIREMENTS

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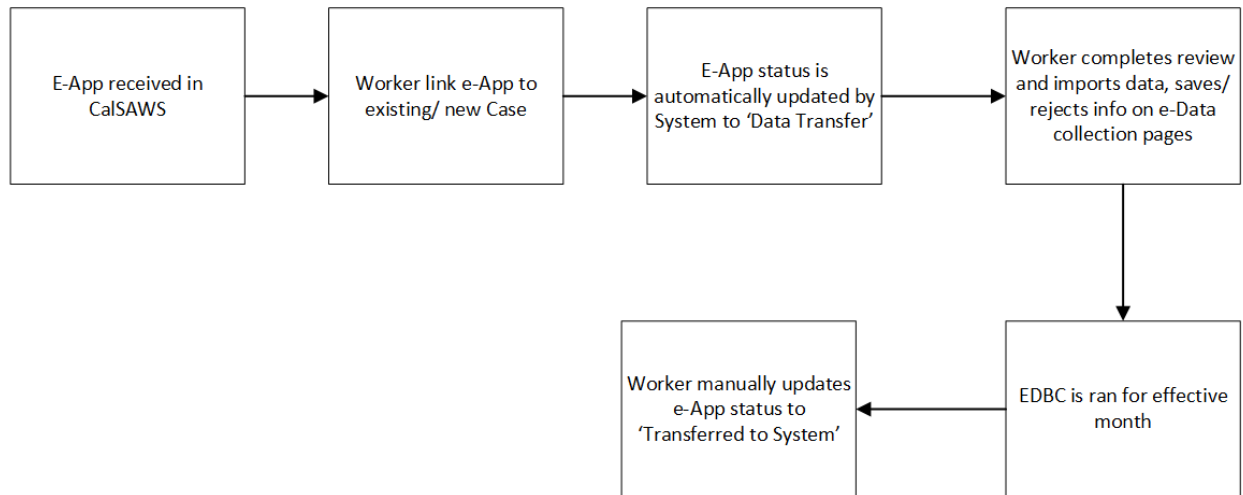
#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.11	The LRS shall automatically trigger batch processing and/or authorize the action when individual or case information is entered through online, interface, or batch processes.	This SCR will enable a batch job to automatically update the status of an e-Application when a program is processed.

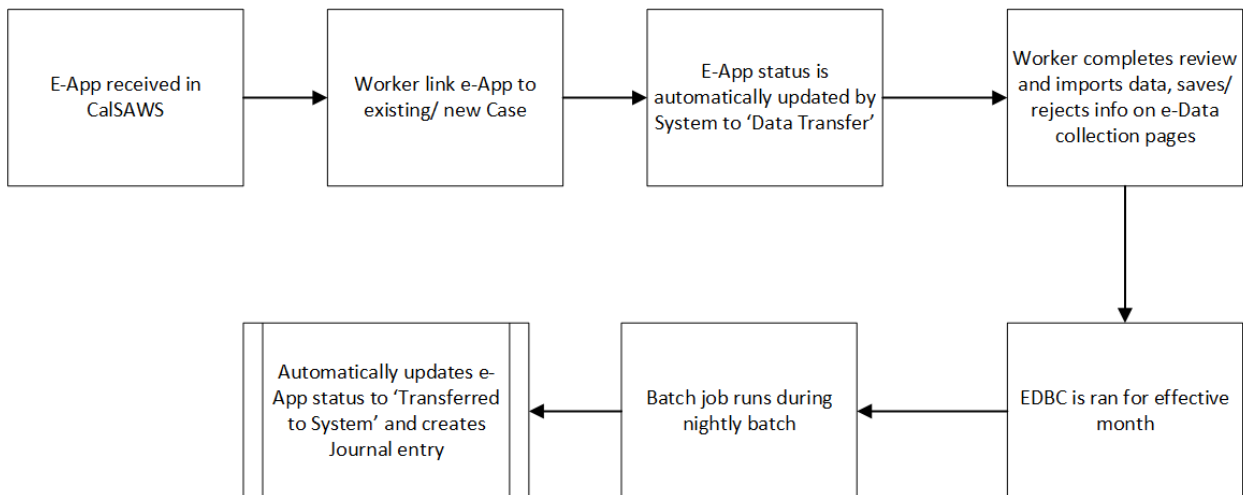


## 4 APPENDIX

### CalSAWS Current E-App Status Process Flow:



### New E-App Process Flow:





California Statewide Automated Welfare System

## **Design Document**

CA-233811

Update the DCFS Interface in CalSAWS to save multiple  
Absent Parent records when received from DCFS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	Edgars Reinholds, Frederick Gains, Victor Nunez, Kristi Rodriguez, Ken Ford

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7/16/2024	1.0	Initial version	Edgars Reinholds
8/7/2024	1.1	Updates from DCFS	Edgars Reinholds

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# 1 OVERVIEW

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This SCR will enhance the Los Angeles County Department of Children and Family Services (DCFS) interface to save multiple Absent Parent records per Foster Care (FC) case.

## 1.1 Current Design

DCFS FC Inbound Interface has the following Transaction Codes:

- 20 – Absent Parent Master Record
- 21 – Absent Parent Address Record
- 22 – Absent Parent Child Record
- 23 – Absent Parent Name

Each transaction is received with the following field amongst others:

- ABSNT\_PRNT\_XREF\_ID - DCFS DataMart identifier for the CW51.

Currently, the child's unique case person identifier (CASE\_PERS.ID of the FC case) is used to find a single absent parent record to do the updates. If more than one absent parent record is received, then the second one is rejected.

SCR CA-233808 created a batch job PB19E486 to update the Absent Parent record applicant to be the resource for ARC cases with Resource Family Home or Relative Home placement.

## 1.2 Requests

Enhance the FC DCFS Inbound interface reader (PI19C884) to create multiple absent parents when received.

## 1.3 Overview of Recommendations

1. Update DCFS FC Inbound Reader (PI19C884) to create and update multiple Absent Parents as received for Transactions Codes 20, 21, 22, 23.

## 1.4 Assumptions

1. Only Transaction Codes 20, 21, 22, 23 pertaining to Absent Parents are impacted.
2. DCFS will need to turn on sending multiple absent parent when the SCR is deployed.

## 2 RECOMMENDATIONS

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### 2.1 Update DCFS FC Inbound Reader (PI19C884)

#### 2.1.1 Overview

Update DCFS FC Inbound Reader (PI19C884) to create and update multiple Absent Parents on a FC case as received for Transactions Codes 20, 21, 22, 23.

#### 2.1.2 Description of Change

1. Update DCFS FC Inbound Reader (PI19C884) to create or update multiple Absent Parents on a FC case as received for Transactions Codes 20, 21, 22, 23. The absent parents would be shown on the Absent Parent List page on the FC case.

Technical Note: Use the transaction's ABSNT\_PRNT\_XREF\_ID absent parent identifier along with the child's case person identifier (CASE\_PERS.ID) to identify the specific absent parent. Due to PB19E486 batch job updating the applicant to be a resource, the search for existing absent parent using the APPLICANT\_CASE\_PERS\_ID may not be appropriate.

#### 2.1.3 Partner Integration Testing

Required. DCFS will need to enable sending multiple absent parents records.

#### 2.1.4 Execution Frequency

No Change.

#### 2.1.5 Key Scheduling Dependencies

No Change.

#### 2.1.6 Counties Impacted

Los Angeles County.

### **2.1.7 Category**

Core.

### **2.1.8 Data Volume/Performance**

N/A

### **2.1.9 Interface Partner**

DCFS Datamart.

### **2.1.10 Failure Procedure/Operational Instructions**

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

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.11	The LRS shall take action on external LRS Data received without intervention by COUNTY-specified Users, to the maximum extent possible.	DCFS Absent Parent Transactions 20, 21, 22, 23 will create multiple absent parents as received.



# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-239537 Update Student Information  
Mapping in Application Transfer API

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Muna
	Reviewed By	Dymas Pena, Connie Buzbee, Cathy Vaisau, William Baretsky, Gillian Bendicio

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/19/2024	0.1	Initial version	Jennifer Muna
7/2/2024	.02	Updated per SSP Committee feedback	Jennifer Muna
8/20/2024	.03	Add update to e-data comparison field name on School Attendance Status Detail page	Jennifer Muna

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# 1 OVERVIEW

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This SCR outlines the necessary updates to the Application Transfer Application Programming Interface (API) to store a student's school attendance.

## 1.1 Current Design

When an e-Application is received in CalSAWS via the Application Transfer API, the customer's school attendance status only displays 'Attending Full Time' within the School Attendance sub-section of the e-Application Summary page. The value is derived from the question 'Full-Time Student (check if yes)' in the SAWS 2 Plus. The enrollment status information of 'Half-Time or more' and 'Less than Half-Time' from SAWS 2 Plus question '6l. - Enrolled status', is not sent from Self-Service Portal or displayed to the worker on the E-Application Summary page.

## 1.2 Requests

Update CalSAWS E-Application Summary page to display the customer's enrolled status as shown on the SAWS 2 Plus. The E-Application Summary page should capture the enrolled status of a customer as per SAWS 2 Plus question '6l. Students. Is anyone who is applying for benefits attending a college or vocational school?' – Enrolled status column.

## 1.3 Overview of Recommendations

1. Add new field in the e-Application Summary page to capture the enrolled status of an applicant when application is received from the Self-Service Portal.
2. Add page mapping for Enrolled status in E-Application Summary page.
3. Update the App Transfer API to capture the enrolled status of a customer.

## 1.4 Assumptions

1. The 'Attendance Status' field on the e-Application Summary page will remain on the page for historic data retention. After the implementation of this SCR, the field will no longer populate data.
2. All other BenefitsCal API's functionality will remain unchanged unless mentioned in this SCR.

## 2 RECOMMENDATIONS

### 2.1 Update to E-Application Summary Page

#### 2.1.1 Overview

The E-Application Summary page displays all application information completed by the customer when submitted from the Self-Service Portal. This section outlines the necessary updates to include a customer's school enrollment information as documented in the SAWS 2 Plus form.

#### 2.1.2 E-Application Summary – Mockup

▼ School Attendance			
▼ Root Questions			
<b>Name:</b> Behr, Hunt	<b>Name of School:</b> Modesto Junior College	<b>Attendance Status:</b>	
<b>Full-time Student:</b> Yes	<b>Enrolled Status:</b> Half-time or more	<b>Number of Units:</b> 12	
<b>School Hours Per Week:</b>	<b>Expected Completion Date:</b>	<b>Drop Out Date:</b>	
<b>Teen Parent School Status:</b>	<b>Teen Parent Status Reason:</b>	<b>Average Work Hours Per Week:</b> 8	
<b>Work Study:</b>	<b>School Term:</b>	<b>Round Trip Distance:</b>	
<b>Transportation Used:</b>	<b>Public Transportation Used:</b>	<b>Public Transportation Cost:</b>	
<b>Degree Type:</b>	<b>Financial Aid:</b> No	<b>Transfer Status:</b>	
▼ Financial Aid			
Source	Source Detail	Begin Date	End Date

Figure 2.1.1-1 – E-Application Summary – School Attendance section

#### 2.1.3 Description of Changes

1. Add new field "Full-time Student:" to capture SAWS 2 Plus question "6b. Full-Time Student (check if yes)".

- a. This field will contain the following values:
  - i. Yes
  - ii. No
  - iii. Blank
  1. **Note:** Historical records will have 'Blank' as value.
- b. Add new page mapping for this field.
2. Add new field "Enrolled Status:" to capture the Enrolled Status from the SAWS 2 Plus form in question '6l. Students. Is anyone who is applying for benefits attending a college or vocational school?' – Enrolled status column.
  - a. This field will contain the following values:
    - i. Half-time or more
    - ii. Less than half-time
  - b. Add a new category to capture the aforementioned 'Enrolled Status' values.
  - c. Add new page mapping for this field.

#### 2.1.4 Page Location

- **Global: Case Info**
- **Local: E-Application Search**
- **Task: E-Application Summary**

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

Update page mapping to include new fields for the e-Application Summary page.

#### 2.1.7 Accessibility

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

#### 2.1.8 Page Usage/Data Volume Impacts

Approximately up to 60,000 e-Applications are received in CalSAWS from the Self-Service Portal each month.

## 2.2 School Attendance Status Detail page

### 2.2.1 Overview

The School Attendance Detail page captures the school information pertaining to a customer. When an e-Application is linked to a case, the school information will be added to the e-data collection functionality. This allows the worker to review the information and import the information into the page. This section outlines the updates necessary to the School Attendance Status Detail page when collecting e-Data from the E-Application Summary page.

### 2.2.2 Description of Change

1. Update Field Name label designation from 'School Attendance Type' to 'Attendance Status' on e-Data Comparison. This field should be labeled appropriately for the attendance status of a person.
2. Add e-data mapping for 'Enrolled Status' on e-Application Summary page to 'Attendance Status' field in School Attendance Status Detail page. **Note:** Full-time student indicator is not required field in the App Transfer API.

Enrolled Status	Full-Time Student Indicator	E-Data Value Display
Half-time or more	Yes	Attending Full Time
Half-time or more	No or blank	Attending Half Time
Less than half-time	N/A	Attending Less Than Half Time

### 2.2.3 Page Location

- **Global: Eligibility > Customer Information**
- **Local: School Attend.**
- **Task: School Attendance List > School Attendance Status Detail**

### 2.2.4 Security Updates

N/A

### 2.2.5 Page Mapping

N/A



### **2.2.6 Accessibility**

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

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

N/A

## 2.3 Self-Service Portal: Update Application Transfer API

### 2.3.1 Overview

The Application Transfer API is a RESTful webservice which purpose is to save an applicant's information into the CalSAWS system. This applicant information is transmitted through the API from the Self-Service Portal. The customer's Attendance status is received as an indicator within the API.

### 2.3.2 Description of Change

1. Modify the Application Transfer API by utilizing the existing element 'enrollCode' to capture the customer's enrollment status when an E-Application is received from the Self-Service Portal.
  - a. Value(s) will include the following:
    - i. Half-time or more
    - ii. Less than half-time
2. Modify App Transfer element 'fullTimeStudentInd' to map to the new 'Full-time Student:' field in e-Application Summary page. **Note:** This modification will result in the 'Attendance Status' field in the 'School Attendance' sub-section in the E-App Summary page to no longer populate data after implementation.

### 2.3.3 Execution Frequency

Real Time

### 2.3.4 Key Scheduling Dependencies

N/A

### 2.3.5 Counties Impacted

All CalSAWS Counties

### 2.3.6 Category

N/A

### 2.3.7 Data Volume/Performance

Approximately up to 60,000 e-Applications are received in CalSAWS from the Self-Service Portal each month.

### **2.3.8 Interface Partner**

Self-Service Portal

### **2.3.9 Failure Procedure/Operational Instructions**

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

## **2.4 Automated Regression Test**

### **2.4.1 Overview**

Create new regression test scripts based on the system test scenarios for the permanent functional changes outlined above

### **2.4.2 Description of Change**

1. Evaluate each system test scenario for the potential of automation.  
Known exclusionary criteria:
  - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
  - b. Technical limitations (ex., visual comparison of a static document against a template)
  - c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
  - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
  - a. Repeatability: The script must be able to execute multiple times between data refreshes
  - b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Interfaces	Application Transfer API YAML file	<a href="#">Application Transfer YAML</a>
2	Interfaces	Application Transfer API HTML file	<a href="#">Application Transfer HTML</a>

## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.1.5	The LRS shall employ Web services, which are platform-independent, standards based Web applications that interact with other applications for the purposes of exchanging data via standardized messaging, e.g., Extensible Markup Language (XML). LRS shall also be capable of Web services based integration with external applications and services. Such Web services must comply with the most current version of the following standards, as supported by the LRS product stack:	This SCR will allow the Self-Service Portal to transmit accurate information into CalSAWS upon submitting a E-Application. This includes student information relevant for eligibility requirements.



California Statewide Automated Welfare System

## **Design Document**

CA-250473

Add Threshold languages for Fair Credit NOA  
fragments

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sindhuja Thiagarajan
	Reviewed By	Nagesha S

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06/27/2024	0.1	Initial Draft	Sindhuja Thiagarajan

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# 1 OVERVIEW

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The purpose of this SCR is to add the Fair Credit Reporting Act (FCRA) compliant verbiage as forms to the CalSAWS Template Repository in threshold languages.

## 1.1 Current Design

Currently Fair Credit Reporting Act (FCRA) compliant verbiage as forms is not available in CalSAWS Template Repository.

## 1.2 Requests

Add CSF 188 (11/2022) and CSF 189 (11/2022) forms to the CalSAWS Template Repository in threshold languages.

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

## 1.3 Overview of Recommendations

Add CSF 188 (11/2022) and CSF 189 (11/2022) forms to the CalSAWS Template Repository in threshold languages.

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

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. As part of CA-214131 Fair Credit Reporting Act (FCRA) compliant verbiage as forms will be implemented in English and Spanish languages.
3. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the English and Spanish forms.
4. All fields (blank or prepopulated) will be editable.
5. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

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### 2.1 Add CSF 188 form to the CalSAWS Template Repository in threshold languages

#### 2.1.1 Overview

This effort will add the State form CSF 188 (11/2022) to the Template Repository in threshold languages.

**State Form:** CSF 188 (11/2022)

**Programs:** Medi-Cal

**Attached Forms:** N/A

**Forms Category:** Form

**Template Repository Visibility:** All Counties

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

#### 2.1.2 Form/NOA Verbiage

##### Create CSF 188 Form XDP

A new XDP will be created for the CSF 188 (11/2022) in threshold languages.

The form will have 1 impression and will consist of State verbiage plus 1 Date input field and 1 variable (see Supporting Documents #1).

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

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

**Form Header:** CalSAWS Standard Header #3 (Header\_3\_4)

**Form Title (Document List Page Displayed Name):** FCRA LNRS Notification

**Form Number:** CSF 188

**Include NA Back 9:** No

**Imaging Form Name:** FCRA LNRS Notification

**Imaging Document Type:** Notification/NOA

**Imaging Case/Person:** Case

**Form Mockups/Examples:** See Supporting Documents #1

### 2.1.3 Form/NOA Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for population logic.

### 2.1.4 Form/NOA Generation Conditions

CSF 188 can be generated via Template Repository.

#### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

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

#### **Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

#### **Mailing Options:**

Mailing Options	Option for CSF 188 Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A

#### **Additional Options:**

Requirement	Option for CSF 188 Form
Post to Self-Service Portal	Y

## 2.2 Add CSF 189 form to the CalSAWS Template Repository in threshold languages

### 2.2.1 Overview

This effort will add the State form CSF 189 (11/2022) to the Template Repository in Threshold Languages.

**State Form:** CSF 189 (11/2022)

**Programs:** Medi-Cal

**Attached Forms:** N/A

**Forms Category:** Form

**Template Repository Visibility:** All Counties

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

### 2.2.2 Form/NOA Verbiage

#### Create CSF 189 Form XDP

A new XDP will be created for the CSF 189 (11/2022) in threshold languages. The form will have 1 impression and will consist of State verbiage plus 1 Date input field and 1 variable (see Supporting Documents #2).

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

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

**Form Header:** CalSAWS Standard Header #3 (Header\_3\_4)

**Form Title (Document List Page Displayed Name):** FCRA EWS Notification

**Form Number:** CSF 189

**Include NA Back 9:** No

**Imaging Form Name:** FCRA EWS Notification

**Imaging Document Type:** Notification/NOA

**Imaging Case/Person:** Case

**Form Mockups/Examples:** See Supporting Documents #2

### 2.2.3 Form/NOA Variable Population

**Field Mappings:** Use the same field mappings as the English and Spanish Forms for population logic.

### 2.2.4 Form/NOA Generation Conditions

CSF 189 can be generated via Template Repository.

#### **Form Print/Mailing Options**

Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish forms.

#### **Print Options:**

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

#### **Form Control:**

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

#### **Mailing Options:**

Mailing Options	Option for CSF 189 Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A

#### **Additional Options:**

Requirement	Option for CSF 189 Form
Post to Self-Service Portal	Y

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	CSF 188	CSF188_AE.pdf CSF188_AR.pdf CSF188_CA.pdf CSF188_CH.pdf CSF188_FA.pdf CSF188_LA.pdf CSF188_HM.pdf CSF188_RU.pdf CSF188_TG.pdf CSF188_KO.pdf CSF188_VI.pdf CSF188_TH.pdf CSF188_UK.pdf CSF188_HI.pdf CSF188_MI.pdf CSF188_JA.pdf CSF188_PU.pdf
2	Correspondence	CSF 189	CSF189_AE.pdf CSF189_AR.pdf CSF189_CA.pdf CSF189_CH.pdf CSF189_FA.pdf CSF189_LA.pdf CSF189_HM.pdf CSF189_RU.pdf CSF189_TG.pdf CSF189_KO.pdf CSF189_VI.pdf CSF189_TH.pdf CSF189_UK.pdf CSF189_HI.pdf CSF189_MI.pdf CSF189_JA.pdf

Number	Functional Area	Description	Attachment
			CSF189_PU.pdf

## 4 REQUIREMENTS

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### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.4 CAR-1208	The LRS shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	CSF 188 and CSF 189 are being added in threshold languages to the Template Repository.

# CalSAWS

California Statewide Automated Welfare System

## Design Document

CA-257179

ACIN I-XX-24- FFY 2024-2025 CalFresh COLA; ACL  
24-XX CW MAP; ACL 24-XX CW IRT - Run Batch  
EDBC



CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/29/2024	1.0	Initial Draft	T. Lazio

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# 1 OVERVIEW

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This SCR will provide details for the one-time batch run that will apply the new CalFresh (CF) COLA, CalWORKS (CW) MAP and CW IRT amounts for FFY 2024 to the CW, Refugee Care Assistance (RCA) and CF (including Nutritional Benefit) programs for the benefit month of October 2024.

## 1.1 Current Design

1. CalWORKs uses the MAP values implemented by SCR CA-243002 effective 10/1/2023.
2. CalWORKs uses the CW Income Reporting Threshold (IRT) Tier 1 and Tier 2 level amounts for 2023/2024 that was updated by CA-243002.
3. CalFresh uses values from FFY 2024 that were implemented by SCR CA-243002.

## 1.2 Requests

Per All County Information Notice (ACIN) I-XX-24 & USDA Food and Nutrition Service SNAP COLA Memo FY 2024, the CF Cost-of-Living Adjustments (COLAs) take effect October 1, 2024, for FFY 2025. The updated values will be implemented in CalSAWS with SCR CA-257180 and batch EDBC must run to calculate new benefit amounts for FFY 2025.

Per All County Letter (ACL) 24-XX, the CW Income Reporting Threshold (IRT) Tier 1 level was increased effective 10/1/2024. The updated values will be implemented in CalSAWS with SCR CA-257180 and batch EDBC must run to calculate the new IRT.

Per All County Letter (ACL) 24-XX, the CW Maximum Aid Payment (MAP) and Income Reporting Threshold (IRT) Tier 2 level was increased effective 10/1/2024. The updated values will be implemented in CalSAWS with SCR CA-257180 and batch EDBC must run to calculate the new values.

## 1.3 Overview of Recommendations

1. Run Batch EDBC to apply the new CF COLA, CW MAP and CW IRT amounts effective October 1, 2024. Batch EDBC will run for CW, RCA CF/NB and FC programs to apply the new CF COLA, CW MAP and CW IRT amounts and to apply benefit updates.
2. DCR to Suppress SAR 2 Form.
3. Generate exception listings and COLA Stat Report for Counties to review.

## 1.4 Assumptions

1. SCR CA-219921 updated the SAR 2 to generate via EDBC so no DCR is needed to trigger or update the SAR 2. The SAR 2 regression testing will be included in this SCR.

2. A regular change NOA will be generated for all impacted cases for which the CF benefits change.
3. Existing batch logic in CalSAWS skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person.
4. Per existing exception logic, batch EDBC run on programs where the existing EDBC for the month is Read-Only will not be authorized.
5. Any Change NOA that currently generates when the respective trigger conditions are met will continue to generate along with the CalFresh Benefit Change COLA NOA. Note: Refer to SCR CA-206711 which updated the triggers for Shelter/Utility Change NOA and the Income Increase NOA. Regression testing of the Shelter/Utility Change NOA will be included with this SCR.
6. No further action is required for no-touch SAR 7 scenarios, as a batch job will run EDBC for the October benefit month.
7. Since the CalFresh population is going to be run through batch EDBC first followed by the SNB population, the following can be expected:
  - If the CF program discontinues then the corresponding SNB will also discontinue.
  - If the CF is excluded through COLA batch for RE/SAR 7 being past due, the system will generate and send the SNB household a SNB Benefit Change NOA.
  - If the RE/SAR 7 is never turned in or is incomplete, the RE/SAR 7 discontinue batch sweep job will discontinue both SNB and CF programs, and the system will generate and send the SNB Discontinue NOA.
  - There are no changes to the logic of the CF notices.
8. An increase in the CalWORKs MAP could potentially change the portion of the ARC amount coming from CalWORKs funds. ARC portion of the FC program EDBCs with 2T, 2S, 2U aid codes shall be processed when there is a change in MAP amounts. There is no CW portion for ARC payments out of 2P or 2R ARC aid codes.
9. Counties can check 'yellow banner' programs daily with the latest Qlik report.
10. CA-205112 updated the functionality to only allow Optional Child back into the household mid-period if user makes the request. Therefore, 'List of Cases where an Optional Child was Added Back into the Household by Batch EDBC' is no longer needed.

## 2 RECOMMENDATIONS

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Batch EDBC will run for CW, RCA CF/NB and FC programs to apply the new CF COLA, CW MAP and CW IRT amounts and to apply benefit updates.

### 2.1 Run Batch EDBC for CW, RCA, CF/NB and FC

#### 2.1.1 Overview

CW, RCA, CF/NB, and FC Batch EDBC will run for the benefit month of 10/2024.

#### 2.1.2 Description of Changes

1. Run batch EDBC for the benefit month of 10/2024 including past RE due date cases for:
  - a. All cases with an active or ineligible Foster Care program with ARC aid codes 2T, 2S, 2U effective for 10/2024 in single program mode. Exclude the following cases:
    - i. EDBC will not be triggered on programs with a Non-standard rate in effect in the benefit month.
    - ii. EDBC will not run if a regular EDBC has already been processed for the benefit month since SCR CA-257180 went into production.
    - iii. Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'.
  - b. Run the above population with Run Reason 'CW/CF COLA' (CT744\_CF).
  - c. Run the above population with Sub Type code 'CW/CF COLA' (CT942\_C1).
  - d. Batch EDBC will insert the following Journal entry:  
Short Description: Batch EDBC ran for <month, year>  
Long Description: Batch EDBC Ran for <Effective Month>.  
Batch EDBC processed for the program for following reasons:  
CW/CF COLA
2. Run batch EDBC for the benefit month of 10/2024 for:
  - a. All cases with an active or ineligible CalWORKs or RCA program in targeted program mode. Targeted program mode will include CF and NB programs on the targeted cases. Exclude the following cases:
    - i. The benefit month is past the latest RE due date for the program.

- ii. The program has a SAR7 Due Month of 09/2024, and the report status is Generated, Sent, Received, or Incomplete.
    - iii. A regular EDBC has already been processed for the benefit month since SCR CA-257180 went to production.
    - iv. Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'.
  - b. Run the above population with Run Reason 'CW/CF COLA' (CT744\_CF).
  - c. Run the above population with Sub Type code 'CW/CF COLA' (CT942\_C1).
  - d. Batch EDBC will insert the following Journal entry:  
 Short Description: Batch EDBC ran for <month, year>  
 Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the program for following reasons: CW/CF COLA.
3. Run batch EDBC for the benefit month of 10/2024 for:
- a. All active or ineligible CF (including TCF) programs in targeted program mode and include NB program. Exclude the following cases:
    - i. The benefit month is past the latest RE due date for the program.
    - ii. The program has a SAR7 Due Month of 09/2024, and the report status is Generated, Sent, Received, or Incomplete.
    - iii. EDBC has already been processed for the benefit month since SCR CA-257180 went to production.
    - iv. Batch EDBC will not run EDBC for 'Yellow Banner' programs where the high-dated EDBC has a source of 'Conversion'.
  - b. Run the above population with run reason 'CF COLA' (CT744\_FS).
  - c. Run the above population with Sub Type code 'CF COLA' (CT942\_C3)
  - d. Batch EDBC will insert the following Journal entry:  
 Short Description: Batch EDBC ran for <month, year>  
 Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the program for following reasons: CF COLA.

### 2.1.3 Programs Impacted

CW  
RCA  
CF  
TCF  
NB  
FC

## 2.2 Create a DCR to Suppress SAR 2

### 2.2.1 Overview

Currently, there are cases in which a SAR 2 is being generated for both the CalFresh and CalWORKS programs during this COLA run. Given that a single SAR 2 per case is sufficient, this recommendation involves implementing the DCR process operationally to prevent the generation of multiple SAR 2s for a single case in conjunction with this COLA run.

### 2.2.2 Description of changes

Run the DCR operationally to mark the earliest generated SAR 2 as 'Printing Error' if more than one SAR 2 generated on a case with this COLA run.

Example: If a SAR 2 got generated for CF at 2.15PM and a SAR 2 got generated for CW at 2.16PM for the same case, the SAR 2 that got generated at 2.15PM (which is for CF) will be marked as 'Printing Error' given that this was the earliest generated SAR 2 on the case.

## 3 OUTREACH

---

### 3.1 COLA STATS by County Report

Generate a statistical report called 'COLA Stats by County Report' that summarizes the EDBC count for **each program (CW/RCA, CF/NB, FC)** included in the COLA by County and contains the following fields:

- <program> EDBC Counts
- <program> EDBC Processed
- <program> EDBC Skipped (Exception)
- <program> EDBC Read Only
- <program> EDBC Stack Trace

- <program> Success %
- **Total EDBC Count**
- **Total EDBC Processed**
- **Total EDBC Skipped (Exception)**
- **Total EDBC Read Only**
- **Total EDBC Stack Trace**
- **Overall Success Rate %**
- **Total NOAs Generated**

**NOTE:** The columns in **bold** will include all programs in the COLA. The counts above will be separated by each County. Also, CF and NB counts will be consolidated under one set of <program> counts designated as 'CF'.

The report will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-257179.

## 3.2 Lists

Generate lists to aid the counties after batch EDBC completes. All lists will have the standard list columns to display on the listings.

### Standard Columns:

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

1. **List Name:** List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".  
**Additional Column(s):** Program Type and Program Closure Reason  
**NOTE:** Include a separate list for FC programs run as part of recommendation 2.1.2.1a.
2. **List Name:** List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person"  
**Additional Column(s):** Program Type  
**NOTE:** Include a separate list for FC programs run as part of recommendation 2.1.2.1a.
3. **List Name:** List of cases where the CW EDBC resulted in a benefit reduction. The case listing will be named "List of CW Cases that Resulted in Benefit Reduction".



**Additional Column(s):** Include columns to indicate each benefit reduction type in a separate column (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)

4. **List Name:** List of cases which resulted in a read-only EDBC. The case listing will be named 'List of Cases That Resulted in Read-Only EDBC'.

**Additional Column(s):** Program Type, Read-Only Reason

**NOTE:** Include a separate list for FC programs run as part of recommendation 2.1.2.1a.

5. **List Name:** List of cases skipped in the batch run. The case listing will be named 'List of Cases Skipped in Batch Run'.

**Additional Column(s):** Skip Reason, Program Type

**NOTE:** Include a separate list for FC programs run as part of recommendation 2.1.2.1a.

6. **List Name:** Generate a list of CW and/or CF cases that meet the following criteria. The case listing will be named 'List of Cases Discontinued Or Denied for Over Income Prior to COLA Increase':

- i. EDBC run between 7/31/2024 and prior to deployment of CTCR SCR CA-257180 for the benefit month of 10/2024 has a denial or discontinuance reason of "Over Income" or "Over Income- \$0 Allotment"

**Additional Column(s):** Program Type, Program Status Reason

7. **List Name:** Generate a list of CW and/or CF cases that meet the following criteria. The case listing will be named 'List of Cases with at least one overridden EDBC for COLA Months':

- i. There is at least one overridden EDBC effective for the current or the Prior Benefit month
- ii. Batch EDBC is run for the COLA Month (10/2024)
- iii. Program is CalFresh, CalWORKs, RCA or Nutritional Benefit

**Additional Column(s):** Program Type

**NOTE:** The case information will display only once on the list even if more than one month may be impacted.

8. **List Name:** Cases excluded from COLA Batch Run. The case listing will be named 'List of Cases Excluded From COLA Batch Run'

**List Criteria:** List of all cases that were excluded from the COLA driving queries based on the case exclusion criteria detailed in Section 2.1.2 (specifically 2.1.2.1.a, 2.1.2.2.a, 2.1.2.3.a). **NOTE:** The 'yellow banner' population included in Section 2.1.2.1.a, 2.1.2.2.a and 2.1.2.3.a will not be part of this listing.

**Additional Column(s):** 'Program Type', 'Reason for Exclusion Description'

**NOTE:** Include a separate list for FC programs run as part of recommendation 2.1.2.1a.

The **non-Foster Care program** lists will be posted to the following location:  
CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-257179.

The **Foster Care program** lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-257179 > Foster Care Lists

## 4 APPENDIX

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### 4.1 Batch Operations:

- a) Run the driving query for FC program (population from recommendation 2.1.2.1a in SCR CA-257179) to insert into SYS\_TRANSACT\_COLA in 'Single Program' mode to run for the month of 10/2024.
- b) Run Batch EDBC for cases with FC program (population from recommendation 2.1.2.1a in SCR CA-257179) identified in (a) above.
- c) Run the driving query for CW/RCA programs with associated CF and NB programs (population from recommendation 2.1.2.2a in SCR CA-257179) to insert into SYS\_TRANSACT\_COLA in 'Targeted Program' mode to run for the month of 10/2024.
- d) Run Batch EDBC for cases with CW/RCA programs with associated CF and NB programs (population from recommendation 2.1.2.2a in SCR CA-257179) identified in (c) above.
- e) Run the driving query for CF program with associated NB program (no CW/RCA-population from recommendation 2.1.2.3a in CA-257179) to insert into SYS\_TRANSACT\_COLA in 'Targeted Program' mode to run for the month of 10/2024.
- f) Run Batch EDBC for cases with CF program with associated NB program (no CW/RCA - population from recommendation 2.1.2.3a in SCR CA-257179) identified in (e) above.
- g) Run DCR to suppress SAR 2 NOAs (all counties).

**ST/Build Operational Note:** If we are running COLA across multiple days, we should be a running driving query each day for the impacted counties. This way, we are not picking the cases that were not supposed to process.

**Note:** Estimated Program Count for CW/CF COLA:

Program	Program Count
CF/NB	2,784,546
CW	350,471
FC	3,269
<b>Estimated Total</b>	<b>3,138,286</b>

# CalSAWS

California Statewide Automated Welfare System

## Design Document

CA-257180

2024-2025 CalFresh COLA; ACL 24-XX Update  
CalWORKs (CW) MAP for 2024-2025; Update  
CalWORKs (CW) IRT Levels for 2024-2025

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/29/2024	1.0	Initial Draft	T. Lazio
08/13/2024	1.1	Update languages and COLA percentage	Raj Devidi
08/19/2024	1.2	Added CF Medical Expense Maximum Limit	T. Lazio

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## 1 OVERVIEW

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This document identifies required changes to CalSAWS related to the following:

1. CalFresh (CF) Cost of Living Adjustments (COLA) for Federal Fiscal Year (FFY) 2025 for the period of October 1, 2024, through September 30, 2025, as informed by the All-County Information Notice I-XX-24, and United States Department of Agriculture, Food and Nutrition Service SNAP COLA Memo FY 2025.
2. CalWORKs Maximum Aid Payment (MAP) Increase for 2024-2025 as informed in ACL 24-XX.
3. CalWORKs Income Reporting Threshold (IRT) change for FFY 2025 as informed in ACL 24-XX.

### 1.1 Current Design

1. The maximum CF allotments and other program limits were last adjusted for FFY 2024 in CalSAWS under CA-243002. CalSAWS uses the FFY 2023-2024 CF amounts for the following values:
  - a. CalFresh Standard Utility Allowance
  - b. CalFresh Limited Utility Allowance
  - c. CalFresh Telephone Utility Allowance
  - d. CalFresh Maximum Allotment
  - e. CalFresh Minimum Allotment
  - f. CalFresh Standard Deduction
  - g. CalFresh Maximum Shelter Deduction
  - h. CalFresh Net Monthly Income Level
  - i. CalFresh Gross Monthly Income Level
  - j. CalFresh Aged Property Limit
  - k. CalFresh Non-Aged Property Limit
  - l. CalFresh Homeless Shelter Deduction
  - m. 165% FPL
  - n. 200% FPL
2. The CW Income Reporting Threshold (IRT) Tier 1 and Tier 2 levels are at the 2023/2024 amounts updated by SCR CA-243002.
3. The CW MAP amounts are at the FFY2024 amounts updated by SCR CA-243002.

## 1.2 Requests

1. Effective October 1, 2024, benefits for all active CalFresh and TCF programs must be calculated and issued based on the COLA for FFY 2025 (including CalFresh Standard Medical Deduction and **CalFresh Medical Expense Maximum Limit**) as set forth in the following sections.
2. Update the CW Income Reporting Threshold (IRT) levels to the FFY 2025 amounts.
3. Update the CW Maximum Aid Payment (MAP) amounts to the FFY 2025 amounts.
4. Update the CW COLA NOA verbiage to the most recent version.
5. Add the NOA title in English and Threshold languages that generates for RCA COLA NOA.

## 1.3 Overview of Recommendations

1. Update CalSAWS code tables with the new CF COLA values (including CalFresh Standard Medical Deduction and **CalFresh Medical Expense Maximum Limit**) for FFY 2025 and end date records from the previous year as of September 30, 2024.
2. Update CalSAWS code tables with the new CW IRT value FFY2024 effective October 1<sup>st</sup>, 2024, and end date record from the previous year as of September 30, 2024.
3. Update CalSAWS code tables with the new Maximum Aid Payment (MAP) values effective October 1<sup>st</sup>, 2024, and end date record from the previous year as of September 30<sup>th</sup>, 2024.
4. Update the NOA logic to generate the CF COLA NOA and CW COLA NOA for 10/2024 COLA.
5. Add the NOA title in English and Threshold languages that generates for RCA COLA NOA.

## 1.4 Assumptions

1. Batch EDBC will be run on CF (including TCF) programs, and any active Nutrition Benefit (NB) programs on the same case as the active CF program to issue benefits for the new CF COLA values under separate SCR CA-257179.
2. Tables in this document give values for Household Sizes up to 10 persons to align with the lookup column layout in CT351. The Household Size of "2" in this document applies to both the CT351 column for "2 Persons" and for "2 Adults."
3. SB 380 Child Maximum Aid Payment is automatically calculated based on the updated CW MAP values.
4. This SCR will update the existing CF COLA NOA fragment logic (see Section 2.2). Per existing CalSAWS logic, other program changes unrelated to the COLA may generate a related NOA instead of the CF COLA NOA.
5. Counties are responsible for providing access to the information in the CF 11 (ENG/SP) CalFresh Mass Change Notice.
6. TEMP 2250 will be mass mailed with the SCR CA-281371.





## 2 RECOMMENDATIONS

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### 2.1 Eligibility Updates

Insert new values into the code tables as specified below using an effective date from 10/01/2024 to high date. The existing high-dated values will be end-dated effective September 30, 2024.

#### 2.1.1 CalFresh Maximum Allotments

The following table lists the new CF Maximum Allotments for all households for FFY 2025. These values are stored in CT351, Code 45.

Household Size	Maximum Aid Payment
1	\$292
2	\$536
3	\$768
4	\$975
5	\$1,158
6	\$1,390
7	\$1,536
8	\$1,756
9	\$1,976
10	\$2,196
Each additional person	\$220

#### 2.1.2 CalFresh Minimum Allotments

No change to the CF Minimum Allotment stored in CT 335, Code MA. The Allotment will remain at \$23.

### 2.1.3 CalFresh Standard Deduction

The following table lists the new CF Standard Deductions for FFY 2025. These values are stored in CT351, Code 48.

Household Size	Standard Deductions
1	\$204
2	\$204
3	\$204
4	\$217
5	\$254
6	\$291
7	\$291
8	\$291
9	\$291
10	\$291
Each additional person	\$0*

*\* all households of six or more get a \$291 deduction with no additional amount added as the household size increases.*

### 2.1.4 CalFresh Maximum Shelter Deduction

The CF Maximum Shelter Deduction for households without elderly or disabled members increased from \$672 to \$712. This value is stored in CT335, Code 50.

Note: The CF Maximum Shelter Deduction does not apply to elderly or disabled households; the full amount of any excess shelter will be deducted. However, this value will still appear in the EDBC Summary.

### 2.1.5 CalFresh Maximum Asset Limits

CF Maximum Asset Limits will be updated with the following:

- The limit for households with at least one member who is age 60 or older or is disabled increased from \$4,250 to \$4,500. This value is stored in CT 335, Code 85.
- For all other households, the limit increased from \$2,750 to \$3,000. This value is stored in CT 335, Code 86.

### 2.1.6 CalFresh Utility Allowances

The following table lists the new Utility Allowances for CF for FFY 2025. These values are stored in CT335. The code for each item is identified in the table.

Utility Allowance Type	Code	Old Value	New Value
Standard Utility Allowance (SUA)	49	\$596	\$645
Limited Utility Allowance (LUA)	34	\$158	\$166
Telephone Utility Allowance (TUA)	33	\$19	*

\* No change to Telephone Utility Allowance (TUA). The TUA value will remain \$19 for FFY2025.

### 2.1.7 CalFresh Homeless Household Shelter Deduction

The CF Homeless Household Shelter Deduction will increase in FFY 2025 from \$179.66 to \$190.30. This value is stored in CT335, Code 48.

### 2.1.8 CalFresh Net Monthly Income Eligibility Standards

The following table lists the new CF Net Monthly Income Eligibility Standards (100% FPL) for FFY 2025. These values are stored in CT351, Code 46.

Household Size	Net Monthly Income Level (100% FPL)
1	\$1,255
2	\$1,704
3	\$2,152
4	\$2,600
5	\$3,049
6	\$3,497
7	\$3,945
8	\$4,394
9	\$4,843
10	\$5,292
Each additional person	\$449

### 2.1.9 CalFresh Gross Monthly Income Eligibility Standards

The following table lists the new CF gross Monthly Income Eligibility Standards for FFY 2025. These values are stored in CT351. The code for each item is in the table.

Household Size	IRT for SAR (130% FPL) Code 47	Elderly/Disabled (165% FPL) Code 58	MCE/BBCE (200% FPL) Code 60
1	\$1,632	\$2,071	\$2,510
2	\$2,215	\$2,811	\$3,408
3	\$2,798	\$3,551	\$4,304
4	\$3,380	\$4,290	\$5,200
5	\$3,963	\$5,030	\$6,098
6	\$4,546	\$5,770	\$6,994
7	\$5,129	\$6,510	\$7,890
8	\$5,712	\$7,249	\$8,788
9	\$6,295	\$7,989	\$9,686
10	\$6,878	\$8,729	\$10,584
Each additional member	\$ 583	\$740	\$898

### 2.1.10 CalFresh Standard Medical Deduction and CalFresh Medical Expense Maximum Limit

The CF Standard Medical Deduction (SMD) will increase in FFY 2025 from \$120.00 to \$150.00 effective 10/01/2024 to high date. The existing high-dated value will be end-dated 9/30/2024. This value is stored in CT335, Code MS.

The CF Medical Expense Maximum Limit will also increase in FFY 2025 from \$155.00 to \$185.00 effective 10/01/2024 to high date. The existing high-dated value will be end-dated 9/30/2024. This value is stored in CT335, Code MF.

### 2.1.11 CalWORKs Tier 1 IRT Update

Update the 100% FPL for a household of 3 as used by the system for CW and RCA Tier 1 IRT (Code Table 335, code AK) effective 10/01/2024 to high date. The existing high-dated value will be end-dated 9/30/2024.

The new amount will be \$2,152 (the system calculates 55% of this value as \$1,184 per ACL 24-XX).

### 2.1.12 CalWORKs Tier 2 IRT Update

The following table lists the new CW and RCA Tier2 IRT values. These values are stored in CT351. These values are effective 10/01/2024, the current high dated values will be end dated to 9/30/2024.

Household Size	CW Tier2 IRT (130% FPL) Code 49
0	\$1,632
1	\$1,632
2	\$2,215
3	\$2,798
4	\$3,380
5	\$3,963
6	\$4,546
7	\$5,129
8	\$5,712
9	\$6,295
10	\$6,878
Each additional member	\$ 583

### 2.1.13 CalWORKs MAP Update

The following tables list the new CW and RCA MAP values. These values are stored in CT351. These values are effective 10/01/2024, the current high dated values will be end dated to 9/30/2024.

#### Region 1

Assistance Unit Size	Maximum Aid Payment Exempt Code 12	Maximum Aid Payment Non-Exempt Code 10
1	\$809	\$734
2	\$1,039	\$930

<b>Assistance Unit Size</b>	<b>Maximum Aid Payment Exempt Code 12</b>	<b>Maximum Aid Payment Non-Exempt Code 10</b>
3	\$1,314	\$1,175
4	\$1,579	\$1,416
5	\$1,850	\$1,659
6	\$2,123	\$1,902
7	\$2,395	\$2,145
8	\$2,669	\$2,389
9	\$2,939	\$2,631
10 or more	\$3,215	\$2,876

### **Region 2**

<b>Assistance Unit Size</b>	<b>Maximum Aid Payment Exempt Code 13</b>	<b>Maximum Aid Payment Non-Exempt Code 11</b>
1	\$770	\$695
2	\$987	\$884
3	\$1,248	\$1,115
4	\$1,498	\$1,346
5	\$1,758	\$1,578
6	\$2,018	\$1,808
7	\$2,274	\$2,039
8	\$2,537	\$2,271
9	\$2,791	\$2,501
10 or more	\$3,054	\$2,731

### **2.1.14 Programs Impacted**

CW, RCA, CF

## 2.2 Update CF COLA NOA logic

### 2.2.1 Overview

The existing fragment logic will be updated in CalSAWS for the 2024 -2025 CalFresh COLA increase.

**Reason Fragment Name and ID:** CF\_CH\_NEW\_COLA\_BENEFIT\_AMT (CalSAWS Fragment ID: 7480)

**Known County NOA:** Derived from CF 377.4 SAR (6/13)

**Current NOA Template:** CF\_NOA\_TEMPLATE (CalSAWS Fragment ID: 3027)

**Current Program(s):** CalFresh

**Current Action Type:** Change

**Current Fragment Level:** Program

**Currently Repeatable:** No

**Includes NA Back 9:** Yes

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

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

### 2.2.2 Description of Change

Update the existing COLA fragment logic for CF\_CH\_NEW\_COLA\_BENEFIT\_AMT (Fragment ID: 7480 CalSAWS) to generate for the EDBC benefit month/year of 10/2024.

### 2.2.3 Form/NOA Generation Conditions

**Update CF COLA reason fragment Generation:**

Update the CF\_CH\_NEW\_COLA\_BENEFIT\_AMT (Fragment ID: 7480 CalSAWS) to generate for the EDBC benefit month/year of 10/2024.

**New NOA Template:** No

**New Program Generation:** No

**New Action Type:** No

**Update to Fragment Level:** No

**New Forms/NOAs Generated with this NOA:** No



## 2.3 Update CW COLA NOA logic

### 2.3.1 Overview

The existing fragment logic will be updated in CalSAWS for the 2024 – 2025 CalWORKs COLA increase. In the existing fragment COLA percentage variable will be updated to reflect the new increase in CalSAWS.

**Reason Fragment Name and ID:** CW\_CH\_COLA\_A881 (CalSAWS Fragment ID: 7459)

**Known County NOA:** Derived from TM44-315M

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

**Current Program(s):** CalWORKs and RCA

**Current Action Type:** Change

**Current Fragment Level:** Program

**Currently Repeatable:** No

**Includes NA Back 9:** Yes

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

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

### 2.3.2 Form/NOA Verbiage

There is no update to the existing verbiage. <COLA\_Percentage> variable is dynamically populating from CT 10467 table and refer table 14 based on CA-253468.

### 2.3.3 Form/NOA Variable Population:

#### 1. Update Regulations for CW COLA Reason

The CW COLA reason has new associated Regulations. The following Regulations will be added when the CW COLA Reason is generated on a NOA:

**Existing English Regulations:** MPP 44-315, AB 120 (Chapter 43, Statutes of 2023)

**Existing Spanish Regulations:** MPP 44-315, AB 120 (Capítulo 43, Estatutos del 2023)

**Updated English Regulations:** MPP 44-315, AB 161 (Chapter 46, Statutes of 2024)

**Updated Spanish Regulations:** MPP 44-315, AB 161 (Capítulo 46, Estatutos del 2024)

#### 2. Update COLA percentage from 3.6 to 0.3

Update CT 10467 CW COLA NOA variable value in refer table 14 descr column from 3.6 to 0.3.

### 2.3.4 Form/NOA Generation Conditions

**Update CW COLA reason fragment Generation:**

Update the CW\_CH\_COLA\_A881 (CalSAWS) to generate for the EDBC benefit month/year of 10/2024.

**Updated County NOA:** Derived from **TM44-315O**

**NOA template Name:** TM44-315O/NA 200

**New NOA Template:** No

**New Program Generation:** No

**New Action Type:** No

**Update to Fragment Level:** No

**New Forms/NOAs Generated with this NOA:** No

## 2.4 Add NOA Title Population for RCA COLA NOA

### 2.4.1 Overview

The NOA title fragment for RCA COLA NOA is not available. Add the title to populate as 'NOTICE OF ACTION REFUGEE CASH ASSISTANCE (RCA) CHANGE' (Fragment Id: 3179) in English and threshold languages.

**Reason Fragment Name and ID:** CW\_CH\_COLA\_A881 (CalSAWS Fragment ID: 7459)

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

**Current Program(s):** CalWORKs and RCA

**Current Action Type:** Change

**Current Fragment Level:** Program

**Currently Repeatable:** No

**Includes NA Back 9:** Yes

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

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

### 2.4.2 Form/NOA Verbiage

The title on the NOA populates as a Variable/Fragment. The new title will read as 'NOTICE OF ACTION REFUGEE CASH ASSISTANCE (RCA) CHANGE'.

### 2.4.3 Form/NOA Variable Population:

1. **Add NOA Title**

Add the title to populate as 'NOTICE OF ACTION REFUGEE CASH ASSISTANCE (RCA) CHANGE' (Fragment Id: 3178) in English and threshold languages for the reason CW\_CH\_COLA\_A881 (Fragment ID: 7459) appearing on the RCA COLA NOA.

**NOA Title:** NOTICE OF ACTION REFUGEE CASH ASSISTANCE (RCA) CHANGE (Fragment Id: 3179).

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

### 2.4.4 Form/NOA Generation Conditions

This effort is not adding/updating generation conditions for RCA COLA NOA.



California Statewide Automated Welfare System

## **Design Document**

**CA-265333**

**Implement Data Encryption Within Application**

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erick Guanzon

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/28/2023	1.0	Initial Draft	Erick Guanzon
08/02/2023	1.1	Added 2.1.3 for the Predictive Handling Batch Job	Henry Lee
06/20/2024	1.2	Updated Assumptions/Appendix	Erick Guanzon

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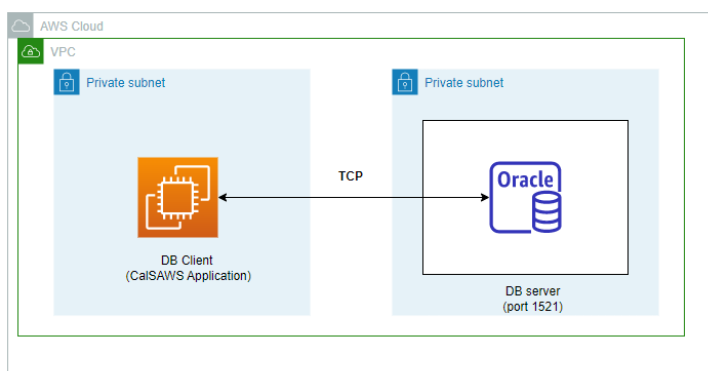
## 1 OVERVIEW

This SCR describes the required components to allow secured communication access to CalSAWS databases via TCPS/TLS1.2

### 1.1 Current Design

CalSAWS databases currently utilize TCP/TLS1.0 as connection protocol. Figure 1 shows the current state of a DB client that's currently interacts with Oracle DB on TCP protocol and default 1521 port.

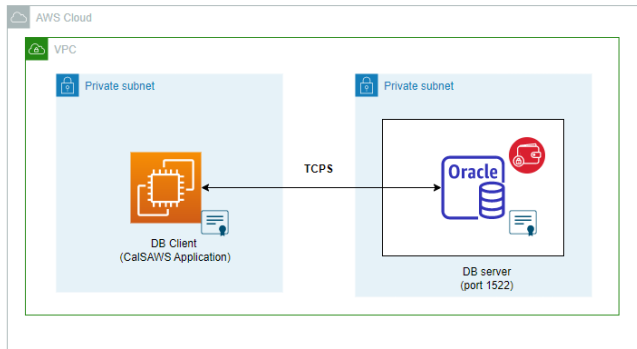
Figure 1 Current State



### 1.2 Requests

Configure CalSAWS databases to accept TCPS and TLS 1.2 connections and update all applications (online, batch, springboots, lambda, etc.) to use TCPS to protocol to connect to CalSAWS databases. Using the secured communication ensures that data in transit is encrypted. Figure 2 shows what would be on the client and DB server side for TCPS enforcement.

Figure 2 Proposed State



### 1.3 Overview of Recommendations

Switching to TCPS protocol requires a trusted certificate to allow secure connection between the client and the Oracle database server. The trusted certificate can be added to an Oracle wallet or can be imported to a truststore container that a specific application can use to obtain secure connectivity.

### 1.4 Assumptions

- This upgrade should not change the functional behavior of the CalSAWS applications.
- Using secure connection should not impact the database performance.
- A DigiCert TLS/SSL certificate will be used to enable Oracle database TCPS connectivity.
- The Database will continue to accept TCP connection for applications that are not ready to migrate to TCPS.
- Local database for development (e.g. ut1saws) will still be in the TCP connection and can be switched to TCPS when self-signed certificate or additional DigiCert is made available.

Commented [EG1]: @Saurvik Basu - please provide an update about oracle friendly certificate

## 2 RECOMMENDATIONS

### 2.1 Description of Changes

The following section outlines the required components to enable TCPS per application domain.



### 2.1.1 Oracle Database

Create wallet on Oracle database server with self-signed certificate. Export certificate for sharing with client applications. Update sqlnet.ora on Oracle database server to accept TCPS connections. Update listener.ora on Oracle database server to configure TCPS listener. Start TCPS listener and exchange certificate with client applications to configure TCPS connectivity.

Commented [EG2]: @Dipikaben Pate please provide the changes that needs to be made on the DB side, the TNS Listener, the certificate, DNS configuration, etc.

Commented [SB3R2]: @Erick Guanzon , @Dipikaben Pate - completed.

### 2.1.2 Java Based Applications

Enabling data encryption transmission in general requires three (3) main components; a valid JDBC connection string that specifies the TCPS protocol, a Java library that supports TCPS and a Trusted Certificate.

Applications using the Java Runtime Environment uses Java DataBase Connectivity (JDBC) driver to connect to Oracle databases. The application should use the version of the Oracle driver that supports TCPS (e.g ojdbc8.jar). The security certificate repository should be utilizing the Java KeyStore (JKS) which allows the storage and management of the trusted certificates in the default truststore called "cacerts". The maintenance of the truststore repository is required whenever there's java patching or new trusted certificate is needed.

Table 1 Java Based Applications – DB TCPS/TLS Enablement

Java Applications	<ul style="list-style-type: none"><li>• CalSAWS Online</li><li>• CalSAWS Webservice</li><li>• CalSAWS Batch</li><li>• Kafka Connectors</li><li>• SpringBoot Applications (~14 services)</li></ul>
Database Connection String	<p><b>Property File Update Example (Online, Batch, Kafka Connectors)</b></p> <ul style="list-style-type: none"><li>• <code>aggregate.datasource.url:</code> <code>jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=TCPS)(HOST=%HOST%)(PORT=%PORT%)) (CONNECT_DATA=(SERVER = DEDICATED) (SERVICE_NAME=%SERVICE_NAME%)))</code></li></ul> <p><b>Application YAML Example (for SpringBoot)</b></p> <ul style="list-style-type: none"><li>• <code>spring.datasource.url:</code> <code>jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=TCPS)(HOST=%HOST%)(PORT=%PORT%)) (CONNECT_DATA=(SERVER = DEDICATED) (SERVICE_NAME=%SERVICE_NAME%)))</code></li></ul>
Certificate Management	<p><b>Java KeyTool</b></p> <ul style="list-style-type: none"><li>• <code>keytool -importcert -file %TRUSTED_CERTIFICATE%.cert -keystore "%JAVA_DIR%/lib/security/cacerts"</code></li></ul>
Other Library	<b>Oracle's JDBC driver</b>

	<ul style="list-style-type: none"> <li>com.oracle:ojdbc8:18.4.0.0.0 &amp; up</li> </ul>
--	---

### 2.1.3 Contact Center / IVR / Child Care Portal

Enabling data encryption transmission for Node-based applications requires four (4) main components: a valid getConnection() Oracledb method that specifies the Oracle Wallet location, a valid database connect descriptor string that specifies the TCPS protocol, a Trusted Certificate, and an Oracle Wallet that stores the certificate.

Node-based applications use the node-oracledb module to connect to Oracle databases. An Oracle Wallet (ewallet.p12 file) serves as the secure certificate repository similar to a Java KeyStore (JKS) and a truststore like "cacerts" that can be used to store and present trusted certificates. Tools like OpenSSL can be used to create and manage the Oracle Wallet by enabling import and export of certificates and associated keys.

Table 2 Node Based Applications – DB TCPS/TLS Enablement

Node Applications	<ul style="list-style-type: none"> <li>Contact Center</li> <li>ChildCare Portal</li> </ul>
Oracledb Method	<pre>const connection = await oracledb.getConnection({   user      : %USER%,   password  : %PASSWORD%   connectString : %CONNECTSTRING%   walletLocation : %PATH\TO\WALLET% });</pre>
Database Connection String	<pre>DESCRIPTION=(ADDRESS=(PROTOCOL=TCPS) (HOST=%HOST%)(PORT=%PORT%)) (CONNECT_DATA=(SERVER = DEDICATED) (SERVICE_NAME=%SERVICE_NAME%))</pre>
Certificate Management	Oracle Wallet, OpenSSL

### 2.1.4 Predictive Handling Batch Job (R language)

Though the Predictive Handling Batch Job is a bash shell script that executes code written in R, a JDBC driver (the RJDBC library) can be used to connect to the Oracle database.

The Predictive Handling job can make use of the same three components used by the Java-based Applications (see section 2.1.1): a valid JDBC connection

string that specifies the TCPS protocol, a Java library that supports TCPS and a Trusted Certificate stored in the Java KeyStore (JKS).

## 2.1.5 Analytics

Currently EMR Clusters and Qlik Clusters connect to Oracle via TCP protocol with TCP port which needs to be changed to TCPS from both EMR as well as Qlik as a part of this SCR. Also, EMR Clusters and Qlik Clusters connect to RDS with TCP as of now which needs to be modified to enable and verify SSL connectivity.

Table 3 Analytics Applications – DB TCPS/TLS Enablement

Analytics Applications	<ul style="list-style-type: none"> <li>Qlik Clusters</li> </ul>
Database Connection String (Oracle)	<p><b>Secret Manager constant update example</b></p> <p>Ingestion URL:  <code>jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=TCPS)(HOST=%HOST%)(PORT=%PORT%)) (CONNECT_DATA=(SERVER = DEDICATED) (SERVICE_NAME=%SERVICE_NAME%)))</code></p> <p><b>Oracle Wallet Example (for Qlik)</b>  <code>jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=TCPS)(HOST=%HOST%)(PORT=%PORT%)) (CONNECT_DATA=(SERVER = DEDICATED) (SERVICE_NAME=%SERVICE_NAME%)))</code></p>
Database Connection String (Aurora MySQL)	<p><b>Secrets Manager update</b>  <code>jdbc:mysql:thin:@//&lt;host IP&gt;:&lt;Port&gt;/&lt;Db_schema_name&gt;?useServerPrepStmts=false&amp;rewriteBatchedStatements=true&amp;useSSL=true</code></p> <p><b>RDS SSL Certificate Example (for Qlik)</b>  CUSTOM CONNECT TO  <code>"provider=QvOdbcConnectorPackage.exe;driver=mysql;host=&lt;hostname&gt;;port=&lt;port&gt;;db=&lt;db_name&gt;;SSLMode=VERIFY_CA;UseTrustStore=true;useBulkReader=true;QueryTimeout=&lt;timeout&gt;;"</code></p>
Certificate Management	<p><b>Java KeyTool, Oracle Wallet, AWS CA Authority</b></p> <ul style="list-style-type: none"> <li><code>keytool -importcert -file %TRUSTED_CERTIFICATE%.crt -keystore "%JAVA_DIR%/lib/security/cacerts"</code></li> </ul>
Other Library	<p><b>Oracle's JDBC driver (oracle.jdbc.OracleDriver)</b></p> <ul style="list-style-type: none"> <li><code>com.oracle:ojdbc8:18.4.0.0.0</code> &amp; up</li> <li><code>com.mysql.jdbc.Driver</code></li> </ul>

## 2.2 Security Updates

A valid DigiCert certificate will be issued and installed in application servers or application wallets.

## 3 SUPPORTING DOCUMENTS

---

N/A

Number	Functional Area	Description	Attachment

## 4 REQUIREMENTS

---

N/A

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

### 4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

## 5 MIGRATION IMPACTS

---

N/A

## 6 OUTREACH

---

N/A

## 7 APPENDIX

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### 7.1 List of Applications that will be migrate to TCPS protocol.

Application / Tools
CalSAWS Online Services
Confluent - Connectors/Streams
CalSAWS Batch
OCAT Service
Lobby Service
Journal Service
Portal Service
Task Service
Appointment Service
Activities Service
Email Service
Fiscal Service
CalSAWS Service
Imaging Service
Fileservice
Kafka Producer Service
EBT Emulator
GAGR
Contact Center
ChildCare Portal
CHEWS
Predictive Handling R
Qlik

### 7.2 List of Applications that will NOT migrate to TCPS protocol.

The following applications will still continue to use the TCP connection

- EMR Serverless
- Internal tools (Automation regression tool written in Python)
- Adhoc Reporting



California Statewide Automated Welfare System

## **Design Document**

CA-265742

Add new NOA to Generate for "Gets Duplicate  
Aid" Reason

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dinesh Kumar Mariyappan
	Reviewed By	Raj Devidi

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/24/2024	1.0	Initial Draft	Dinesh Kumar Mariyappan

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# 1 OVERVIEW

---

The purpose of this design is to add new NOA to generate for "Gets Duplicate Aid" reason in English and available threshold languages.

## 1.1 Current Design

Currently, CalSAWS only has Denial NOA 'On Aid Another Case'.

## 1.2 Requests

1. Add Denial NOA-Gets Duplicate Aid to generate for "Gets Duplicate Aid" reason.  
Languages include: English, Spanish, Armenian, Arabic, Chinese, Cambodian, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.3 Overview of Recommendations

1. Add Denial NOA-Gets Duplicate Aid" to generate for "Gets Duplicate Aid" reason.  
Languages include: English, Spanish, Armenian, Arabic, Chinese, Cambodian, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

## 1.4 Assumptions

1. The NOA template remains the same and is not being updated.
2. The existing variable population is not being updated with this effort.
3. This existing verbiage is not being updated with this effort.
4. As part of CA-201312, an "On Aid Another Case" NOA's has been added.
5. Supporting Documents section references attachments found on Jira.

## 2 RECOMMENDATIONS

---

### 2.1 Adding new NOA to generate for Gets Duplicate Aid Reason

#### 2.1.1 Overview

Add new NOA to generate for "Gets Duplicate Aid" reason in English and all available threshold languages.

**State Form/NOA:** NA 290

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

**Programs:** CalWORKs

**Action Type:** Denial

**Fragment Level:** Program

**Repeatable:** No

**Include NA Back 9:** Yes

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

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

#### 2.1.2 NOA Verbiage

Use an existing "On Aid Another Case" (Snippet ID: 7643) reason verbiage for "Gets Duplicate Aid" reason as well.

This effort will not be updating the NOA reason verbiage.

**NOA Mockups/Examples:** See supporting document #1

Reason Fragment	Action Fragment	Message Fragment
All Household members are aided on another case.	Use Existing Action: (CW_DN_ACTION1)  The County has denied your application for cash aid dated <EffectiveDenialDate>.  Here's why:	N/A

#### 2.1.3 NOA Variable Population

This effort will not be updating the NOA variable population.

#### 2.1.4 NOA Generation Conditions

The new NOA should be triggered when a person has been denied for CalWORKs with the status reason of 'Gets Duplicate Aid'.

Generate a NOA with this new fragment reason of EDBC when all of the following conditions are true for a program person:

1. The EDBC program is CalWORKs.
2. The person is denied in the currently run EDBC.
3. The person is failing for the reason of 'Gets Duplicate Aid' Status reason (CT73\_GD).
4. All program persons on the program are not failing for the reason of 'Gets Duplicate Aid' Status reason (CT73\_GD).
5. There is not an existing EDBC for the program for the current or prior Benefit month

**or**

there is at least one existing EDBC for the current Benefit month and in the most recent saved EDBC for that month the person did not have an active status with a role of member.

**or**

there is not a previously existing EDBC for the current Benefit month and there is at least one EDBC for the previous month and in the most recent saved EDBC for the previous month the person did not have an active status with a role of member.

**Ordering on NOA:** The Action Fragment will be generated first followed by reason fragment.

#### **NOA Title and Footer Reference for new Reason Fragment**

**NOA Reference on Document List Page:** On Aid Another Case

**NOA Title:** NOTICE OF ACTION – CALWOKS DENIAL

NOA Title Requires Translations: No

**NOA Footer:** NA 290

NOA Footer Requires Translation: No

#### **Fragment Regulation**

Add the below regulations to the new Reason Fragment

**REGULATIONS:** 40-103.41 and 40-105.3

**TECHNICAL NOTE:** Currently, system has three NOA's for "On Aid Another Case" reason for CalFresh, CalWORKs and Immediate Need programs. As part of this effort, we are adding new NOA entry for "Gets Duplicate Aid" Reason for CalWORKs program in CT\_662.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	NOA	NA290_GetsDuplicateAid English Mockup	NA290_GetsDuplicateAid_EN Mockup.pdf

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"><li>a. Appointment notices.</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms.</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices:</li><li>e. Contact letters.</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site.</li><li>g. Information notices and stuffers.</li><li>h. Case-specific verification/referral forms.</li><li>i. GR Vendor notices.</li><li>k. Court-mandated notices, including Balderas notices.</li><li>l. SSIAP appointment notices.</li><li>m. Withdrawal forms.</li><li>n. COLA notices.</li><li>o. Time limit notices.</li><li>p. Transitioning of aid notices.</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS).</li><li>r. Non-compliance and sanction notices.</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices.</li><li>t. Corrective NOAs on State Fair Hearing decisions.</li><li>u. CSC paper ID cards with LRS-generated access information; and</li><li>v. CSC PIN notices.</li></ul>	<p>Gets Duplicate Aid is being added as notice in English and available threshold languages.</p>

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-265825

Update CCSAS to establish handshake for ARC cases; send one time discontinuance updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	[Edgars Reinholds, Victor Nunez, Ken Ford, Balakumar Murthy ]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/23/2024	1.0	Initial Version	Edgars Reinholds

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# 1 OVERVIEW

---

This SCR will sync up CalSAWS and California Child Support Automation System (CCSAS) on ARC caregiver IV-A identifiers and final discontinuance statuses that were not sent.

## 1.1 Current Design

IV-A identifier is a unique participant identifier in CalSAWS system that is transmitted to CCSAS.

IV-D identifier is a unique participant identifier that is received from CCSAS.

SCR CA-244150 was created to correct sending of IV-A Identifiers and to save the IV-D Identifier when the Support questionnaire is having an ARC caregiver. The IV-A identifier being sent was same as the support questionnaire's Absent Parent.

Also, the SCR CA-244150 will correct the CCSAS interface to send a discontinuance when it takes effect. Updates were sent only for active participants. So, CCSAS would never know that the aid has ended.

Change in IV-A identifier is not supported by the interface and would result in a one-time sync up with CCSAS.

CCSAS Update Writer (PB00F1611) limits processing member updates for Dependent (DP) participants that are no longer aided up to month in the past.

## 1.2 Requests

1. CalSAWS must update IV-D number from CCSAS for future handshakes which is not in current production.
2. CCSAS needs to receive eligibility status (from Eligible to Ineligible) updates for DPs and CPs (Primary Applicants) from CalSAWS to reflect the correct eligibility status in CCSAS.

## 1.3 Overview of Recommendations

1. Create a DCR to sync up the new ARC caregiver IV-A identifier with the IV-D identifier. (Requires extract from CCSAS).
2. Create and schedule a one-time run of CCSAS Update Writer (PB00F1611). The discontinued cases will be operationally swept in by a DCR from SCR CA-244150.

## 1.4 Assumptions

1. SCR CA-244150 must be done at the same time as this SCR.

2. SCR CA-244150 – will implement the logic for saving and sending ARC IV-A identifier and send one last update when discontinuance takes effect.
3. SCR CA-244150 – will sweep in the necessary cases to process for CCSAS Update Writer (PB00F1611).
4. CCSAS will use the IV-D identifier for matching participants before the IV-A identifier. So, there is no need to sync up IV-A identifier in CCSAS system.

## 2 RECOMMENDATIONS

---

This SCR will sync up CalSAWS and CCSAS on ARC caregiver IV-A identifiers and final discontinuance statuses that were not sent.

### 2.1 DCR to sync up new IVA identifier with the IVD identifier.

#### 2.1.1 Overview

An extract of ARC participants with corresponding IV-D identifiers is to be processed and updated in CalSAWS.

#### 2.1.2 Description of Change

1. Process a CSV file provided by CCSAS containing the IV-D Identifier of all ARC applicants that are resources.
2. The file is expected to contain the following fields (order may change):
  - a. First Name
  - b. Last Name
  - c. Public Assistance County
  - d. Public Assistance Case Number
  - e. FBU
  - f. IV-D Participant Number
  - g. IV-A Identifier (If available)
  - h. SSN (if available)
  - i. DOB (if available)
3. Using the provided County and Case Number, and matching on the ARC caregivers name, update ABSENT\_PARNT\_TXFR.IVD\_PARTICIPANT\_IDENTIF column with the provided IV-D Participant Number. This would establish the IV-A and IV-D handshake for future updates on this participant.

#### 2.1.3 Estimated Number of Records Impacted/Performance

CalSAWS has 40,000 support questionnaire records with a resource as the applicant.

## **2.2 One-time batch run of CCSAS Update Writer (PB00F1611)**

### **2.2.1 Overview**

CCSAS Update Writer (PB00F1611) limits processing member updates for DP participants that are no longer aided up to month in the past. Create a one-time batch to process the DP participants that are discontinued more than one month in the past.

### **2.2.2 Description of Change**

1. Create a BPCR/BSCR for a one-time batch of CCSAS Update Writer (PB00F1611) to process updates for participants that are discontinued and are still having ABSENT\_APRNT\_TXFR.ELIG\_STAT\_CODE value of "E". Note: the cases to process will be swept in by the DCR of SCR CA-244150.
2. Update the logic for detecting DP participant updates, to allow the DP to be discontinued more than 1 month in the past.

### **2.2.3 Execution Frequency**

One time.

### **2.2.4 Key Scheduling Dependencies**

N/A.

### **2.2.5 Counties Impacted**

All Counties.

### **2.2.6 Category**

N/A.

### **2.2.7 Data Volume/Performance**

Anticipate approximately 477,000 participant updates or 240,000 cases to be sent to CCSAS.

### **2.2.8 Failure Procedure/Operational Instructions**

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

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.5	The LRS shall automatically evaluate/process ED/BC accounting for the impact of change(s) on all assistance units on a case, on an individual, and on any or all companion cases that could potentially be affected by the change(s). - Eligibility Determination and Benefit Calculation (EDBC)	This SCR updates the CCSAS Outbound Interface to send a final discontinuance update when program discontinuance takes effect.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-271130

Update CW 2186A and CW 2184

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/7/2024	1.0	Draft Design	Phong Xiong
8/12/2024	2.0	Updated design based on committee feedback	Phong Xiong

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# 1 OVERVIEW

---

This effort will update the CalSAWS versions of the CW 2186A and CW 2184 to the newest State versions.

## 1.1 Current Design

As part of ACL 24-07 the State updated both the CW 2186A and CW 2184 forms.

## 1.2 Requests

1. Update the CalSAWS versions of the CW 2186A and CW 2184 to match the latest State versions.

## 1.3 Overview of Recommendations

1. Update the CalSAWS CW 2186A to the newest State version in English and all available Threshold Languages
2. Update the CalSAWS CW 2184 to the newest State version in English and all available Threshold Languages

## 1.4 Assumptions

1. There will be no updates the generation conditions or variable population with this effort.
2. There will be no changes to print options with this effort.
3. The new versions of the forms and translations will be added to BenefitsCal with CSPM-74020.

## 2 RECOMMENDATIONS

---

### 2.1 Update the CW 2186A “CalWORKs Exemption Request Form” in Template Repository

#### 2.1.1 Overview

Update the CW 2186A in Template Repository to the newest State version.

**State Form:** CW 2186A, this effort will update to 1/24 version

**Current Programs:** CalWORKs, Welfare-to-Work, REP

**Current Attached Form(s):** N/A

**Current Forms Category:** Application

**Current Template Repository Visibility:** All Counties

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

#### 2.1.2 NOA/Form Verbiage

##### Update Form XDP

Update the existing CW 2186A to match the latest state CW 2186A (1/24) version. Add new threshold language versions, see updated languages below.

**Updated Languages:** Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hindi (new), Hmong, Japanese (new), Korean, Lao, Mien (new), Punjabi (new), Russian, Spanish, Tagalog, Thai (new), Ukrainian (new), Vietnamese

**Form Mockups/Examples:** See Supporting Documents #1

#### 2.1.3 NOA/Form Variable Population

There will be no new Variable Population with this effort.

#### 2.1.4 NOA/Form Generation Conditions

There will be no updates to the current Generation Conditions of the CW 2186A. This form is currently available in Template Repository and can be mailed Locally and Centrally.

## 2.2 Update the CW 2184 “CALWORKS 60-MONTH TIME LIMIT”

### 2.2.1 Overview

Update the CW 2184 in Template Repository to the newest State version. This effort will update the version that is available in Template Repository and the version attached to CalWORKs 60-month Time Limit NOAs.

**State Form:** CW 2184, this effort will update to 1/24 version

**Current Programs:** CalWORKs

**Current Attached Form(s):** N/A

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All Counties

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

### 2.2.2 NOA/Form Verbiage

#### Update Form XDP

Update the existing CW 2184 to match the latest state CW 2184 (1/24) version. Add new threshold language versions, see updated languages below.

**Updated Languages:** Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hindi (**new**), Hmong, Japanese (**new**), Korean, Lao, Mien (**new**), Punjabi (**new**), Russian, Spanish, Tagalog, Thai (**new**), Ukrainian (**new**), Vietnamese

Notes:

1. The version that is attached to the CalWORKs Time Limit NOAs will only be updated in existing languages (Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese).
2. The CW 2184 also exists in the CW RE Packet (MIG) and CW-CF RE Packet (MIG). This update will be included in the packets as well and will only be updated in existing languages (Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese).

**Form Mockups/Examples:** See Supporting Documents #2

### 2.2.3 NOA/Form Variable Population

There will be no new Variable Population with this effort.

### 2.2.4 NOA/Form Generation Conditions

There will be no updates to the current Generation Conditions of the CW 2184. This form is currently available in Template Repository (Print Local only) and generates as part of CalWORKs Time Limit NOAs, CW RE Packet (Migration Counties), and CW-CF RE Packet (Migration Counties).

## 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Forms	CW 2186A  Note: When generated from the system will include a cover sheet for mailing purposes.	CW2186A.pdf
2	Forms	CW 2184	CW2184.pdf

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1208	The LRS shall accommodate and generate State-mandated forms, notices, and NOAs that cannot be changed.	Updating CW 2186A and CW 2184 to newest State versions.

# CalsAWS

California Statewide Automated Welfare System

## **Design Document**

CA- 274665

GAGR NOA's field populating wrong amount from  
the GR\_Budget table



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## 1 OVERVIEW

---

This SCR will add ongoing monthly benefits to the GR NOAs as potential benefit amount minus the vendor payment.

### 1.1 Current Design

On the current GR Denial/Discontinuance NOAs, the particular field 'ongoing monthly benefits you will get' is getting populated by the 'Potential Grant' amount. On the current GR Approval NOAs, the field 'ongoing monthly benefits you will get' is getting populated by the budgeted needs amount.

### 1.2 Requests

On the GR NOAs, for the particular field 'ongoing monthly benefits you will get', the value should be changed to Potential Benefit minus the Vendor Issue Amount.

### 1.3 Overview of Recommendations

On the GR NOAs, for the particular field 'ongoing monthly benefits you will get', the value should be sent as variable ongoingBenefitAmt and populated by the Potential Benefit minus the Vendor Issue Amount.

### 1.4 Assumptions

No other variables will be changed in the GenerateDocumentRequest.

## 2 RECOMMENDATIONS

---

### 2.1 Add new Variable to send the appropriate ongoing monthly benefits.

#### 2.1.1 Overview

1. ongoingBenefitAmt is the new field that will be sent and linked to "Ongoing Monthly Benefits You Will Get".
2. It will be the Potential Benefit Amount – Vendor Payment
3. Example:  
If Potential Benefit is \$596 and Vendor Issue amount is \$60, we will send \$536 as ongoingBenefitAmt

#### 2.1.2 Description of Change

One new variable ongoingBenefitAmt will be sent in the GenerateDocumentRequest.

Response field	Type	Required	Description
ongoingBenefitAmt	String	Yes	The ongoing monthly benefits. Derived from EDBC. POTENTIAL_BEN_AMT – VEND_PMT.PMT_AMT

---

### 2.1.3 Execution Frequency

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

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

### 2.1.4 Key Scheduling Dependencies

N/A

### 2.1.5 Counties Impacted

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

### 2.1.5 Data Volume/Performance

N/A

#### **2.1.6 Interface Partner**

GA/GR Correspondence Service (Hosted by Gainwell)

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

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

### **3 SUPPORTING DOCUMENTS**

---

N/A

# CalsAWS

California Statewide Automated Welfare System

## **Design Document**

CA-275302

San Diego - Position Task Categories and Task  
Type Configurations

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/23/2024	1.0	Initial Revision	Vallari Bathala, Justin Dobbs

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# 1 OVERVIEW

---

This design outlines recommendations to create new Task Types and Position Task Category associations for San Diego County.

## 1.1 Current Design

San Diego County processes IFD's and Quality assurance Tasks in a specialized Office. Currently these specialized Tasks are being routed to Offices via the Bundling and Sibling Assignment functionalities available in the CalSAWS Task Management System. However, Bundling and Sibling Assignment functionalities do not route the Tasks to specific Positions in the Family Resource Center (FRC) Offices and the Quality & Eligibility Support (QESD) Division.

## 1.2 Requests

1. Create new Task Types associated to the 'Quality Assurance Assignment' Task Category.
2. Modify a population of Positions to be configured for the 'Quality Assurance Assignment' Task Category.
3. Modify a population of Positions to be configured for all Task Categories except for 'VITA' and 'Quality Assurance Assignment'.
4. Modify a population of Task Types to have expiration configurations.

## 1.3 Overview of Recommendations

1. Create a data change to create new Task Types associated to the 'Quality Assurance Assignment' Task Category.
2. Create a data change to modify a population of Positions to be configured for the 'Quality Assurance Assignment' Task Category.
3. Create a data change to modify a population of Positions to be configured for all Task Categories except for 'VITA' and 'Quality Assurance Assignment'.
4. Create a data change to configure expiration for a population of Task Types.

## 1.4 Assumptions

N/A

## **2 RECOMMENDATIONS**

---

This section will outline recommendations to introduce new Task Types for the 'Quality Assurance Assignment' Task Category and update specific Position Task Category configurations for San Diego County.

### **2.1 Position Detail**

#### **2.1.1 Overview**

This section will outline recommendations to modify Position Task Category associations.



### 2.1.2 Position Detail Reference Example

**Position Detail**
\* Indicates required fields

Save
Save and Copy
Cancel

---

### General Position Information

<b>Worker ID:</b> 37AS003700  <b>Office Name: *</b> MILLS-SPOS  <b>Unit ID: *</b> 26 00  <b>Assignment Type Code:</b> <input type="text"/>  <b>Auto Assign Indicator:</b> <input type="text"/>  <b>SSI Referrals:</b> <input checked="" type="checkbox"/> No  <b>Authorization Sampling Percentage:</b> <input type="text"/>  <b>Case Load:</b> Traditional  <b>IHSS Referrals Auto Assignment: *</b> <input checked="" type="checkbox"/> No	<b>Section:</b> <input type="button" value="Select"/>  <b>Position Status: *</b> <input type="text" value="Active"/>  <b>Worker Level:</b> <input type="text" value="2nd Level Reception Log/Authorization"/>  <b>Max Case Load:</b> <input type="text" value="0"/>  <b>Max Intake Case Load:</b> <input type="text"/>  <b>Current Case Load:</b> 0  <b>Total Percentage of Cases Assigned:</b> 0%  <b>Task Action Step Completion Required:</b> <input type="text"/>
---	---

---

### Appointment Threshold

Category	Type	Daily Threshold	Overlapping Appointments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

---

### Program(s)

☐ Nutrition Benefit     
 ☐ RCA     
 ☐ REP  
☐ Welfare to Work

---

### Case Flags

---

### Tasks

<input type="checkbox"/> Application (All) <input type="checkbox"/> Application Registration <input type="checkbox"/> CalHEERS <input type="checkbox"/> CMIPSI <input type="checkbox"/> e-Application <input type="checkbox"/> e-ICT	<input type="checkbox"/> Batch EDBC <input type="checkbox"/> CWS <input type="checkbox"/> External Agency Admin <input type="checkbox"/> Fraud <input type="checkbox"/> IEVS Criminal <input type="checkbox"/> Legacy <input type="checkbox"/> MC 355 <input type="checkbox"/> MEDS Liaison <input checked="" type="checkbox"/> Quality Assurance Assignment <input type="checkbox"/> Redetermination <input type="checkbox"/> Screening Packet <input type="checkbox"/> Time Limits	<input type="checkbox"/> Case Update <input type="checkbox"/> EBT <input type="checkbox"/> Foster Care RDB <input type="checkbox"/> IEVS <input type="checkbox"/> IEVS Priority <input type="checkbox"/> Manual <input type="checkbox"/> MEDS Alert <input type="checkbox"/> QR7LA <input type="checkbox"/> Quality Review <input type="checkbox"/> SAR7 <input type="checkbox"/> Self Service Portal Communications <input type="checkbox"/> VITA
---	---	---

---

### Phone Information

Type *	Number *	Extension
<input type="checkbox"/> Main	<input type="text" value="(555)555-5555"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

---

• **Quality Review Type(s)**

---

• **Legacy File Number**

Save
Save and Copy
Cancel

**Figure 2.1.1-1 – Position Detail – Quality Assurance Assignment Task Category**

**Position Detail**

\* Indicates required fields

Save Save and Copy Cancel

---

**General Position Information**

Worker ID: 37AS003700

Office Name: \* MILLS-SPOS

Unit ID: \* 26 00

Assignment Type Code:

Auto Assign Indicator:

SSI Referrals: No

Authorization Sampling Percentage: 0

Case Load: Traditional

IHSS Referrals Auto Assignment: \*

Section: Select

Position Status: \* Active

Worker Level: 2nd Level Reception Log/Authorization

Max Case Load: 0

Max Intake Case Load:

Current Case Load: 0

Total Percentage of Cases Assigned: 0%

Task Action Step Completion Required:

---

**Appointment Threshold**

Category	Type	Daily Threshold	Overlapping Appointments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

---

**Program(s)**

☐ Nutrition Benefit ☐ RCA ☐ REP

☐ Welfare to Work

---

**Case Flags**

---

**Tasks**

<input checked="" type="checkbox"/> Application (All)	<input checked="" type="checkbox"/> Batch EDBC	<input checked="" type="checkbox"/> Case Update
<input checked="" type="checkbox"/> Application Registration	<input checked="" type="checkbox"/> CWS	<input checked="" type="checkbox"/> EBT
<input checked="" type="checkbox"/> CalHEERS	<input checked="" type="checkbox"/> External Agency Admin	<input checked="" type="checkbox"/> Foster Care RDB
<input checked="" type="checkbox"/> CMIPSII	<input checked="" type="checkbox"/> Fraud	<input checked="" type="checkbox"/> IEVS
<input checked="" type="checkbox"/> e-Application	<input checked="" type="checkbox"/> IEVS Criminal	<input checked="" type="checkbox"/> IEVS Priority
<input checked="" type="checkbox"/> e-ICT	<input checked="" type="checkbox"/> Legacy	<input checked="" type="checkbox"/> Manual
	<input checked="" type="checkbox"/> MC 355	<input checked="" type="checkbox"/> MEDS Alert
	<input checked="" type="checkbox"/> MEDS Liaison	<input checked="" type="checkbox"/> QR7LA
	<input type="checkbox"/> Quality Assurance Assignment	<input checked="" type="checkbox"/> Quality Review
	<input checked="" type="checkbox"/> Redetermination	<input checked="" type="checkbox"/> SAR7
	<input checked="" type="checkbox"/> Screening Packet	<input checked="" type="checkbox"/> Self Service Portal Communications
	<input checked="" type="checkbox"/> Time Limits	<input type="checkbox"/> VITA

---

**Phone Information**

Type *	Number *	Extension
<input type="checkbox"/> Main	(555)555-5555	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

Remove

---

• Quality Review Type(s)

---

• Legacy File Number

---

Save Save and Copy Cancel

Figure 2.1.1-2 – Position Detail – All Task Categories except Quality Assurance Assignment and VITA

### 2.1.3 Description of Changes

1. Update defined Positions to be configured with ONLY the “Quality Assurance Assignment” Task Category (Reference the Tasks panel in Figure 2.1.1-1).

Attached file "CA-275302 – SD – Position Inventory" in section [3. Supporting Documents](#), worksheet "QESD Staff" lists all Positions (Worker IDs) that this configuration will be applied to.

2. Update defined Positions to be configured with all selectable Task Categories on the Position Detail page EXCEPT for the following:
  - a. Quality Assurance Assignment
  - b. VITA

(Reference the Tasks panel in Figure 2.1.1-2).

Attached file "CA-275302 – SD – Position Inventory" in section [3. Supporting Documents](#), worksheet "FRC Staff" lists all Positions (Worker IDs) that this configuration will be applied to.

3. Implement a rollback data change process that will restore the Position/Task Category configurations to the previous state. This rollback data change will be available if unintended results require it to be run.

#### 2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

#### 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

There are no expected page usage/data volume impacts.

### 2.2 Task Type Detail

#### 2.2.1 Overview

This section will outline recommendations to add new Task Types that are associated to the 'Quality Assurance Assignment' Task Category.

## 2.2.2 Task Type Detail Reference Example

Task Type Detail		
<div><div>*- Indicates required fields</div><div>EditClose</div></div>		
Task Type Information		
<b>Name: *</b> ADH/IPV	<b>Category: *</b> Quality Assurance Assignment	<b>Priority:</b> Medium
<b>Available Online:</b> Yes	<b>Available for Automation:</b> No	
<b>Instructions:</b>		
<b>Expire Tasks: *</b> Yes	<b>Expiration Period: *</b> 90 day(s)	<b>Expiration Type: *</b> After Task Created/Start Date
<b>Newly Assigned Indicator: *</b> Tasks display indicator for 5 day(s)		
▼ Sub-Type Information		

Figure 2.2.1-1 – Task Type Detail – View Mode

## 2.2.3 Description of Changes

1. Create new Task Types for San Diego County associated to the 'Quality Assurance Assignment' Task Category. Attached file "CA-275302 – SD – New QA Assignment Task Type Configurations", worksheet "New Task Types" in section [3. Supporting Documents](#) provides the necessary attributes for each new Task Type.
2. Modify the expiration configurations for the Task Types as outlined in the attached file "CA-275302 – SD – New QA Assignment Task Type Configurations", worksheet "Task Type Inv for Expiration".

## 2.2.4 Page Location

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

## 2.2.5 Security Updates

N/A.

## 2.2.6 Page Mapping

N/A.

### **2.2.7 Accessibility**



N/A.

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

There are no expected page usage/data volume impacts.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	Tasks	<p>"QESD Staff" worksheet lists all Positions (Worker IDs) that is ONLY configured with the "Quality Assurance Assignment" Task Category.</p> <p>"FRC Staff" worksheet lists all Positions (Worker IDs) that is configured with Task Categories EXCEPT 'Quality Assurance Assignment' and 'VITA'.</p>	 CA-275302 - SD - Position Inventory.xl
2	Tasks	List of the necessary attributes for each new Task Type for 'Quality Assurance Assignment' Task Category.	 CA-275302 - SD - New QA Assignment

## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	Create new Task Types associated to the 'Quality Assurance Assignment' Task Category. Modify a population of Positions to be configured for the 'Quality Assurance Assignment' Task Category and modify a separate population of Positions to be configured for all Task Categories except for 'VITA' and 'Quality Assurance Assignment'.

## 5 OUTREACH

---

N/A



## 6 APPENDIX

---

N/A

# CalsAWS

California Statewide Automated Welfare System

## **Design Document**

CA-275304

San Diego - Update Document Routing Rule  
Program Based Rules

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/18/2024	1.0	Initial Revision	Vallari Bathala, Justin Dobbs

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# 1 OVERVIEW

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This design outlines recommendations to update Document Routing Rule Program Based Rule configurations for San Diego County.

## 1.1 Current Design

Document Routing Rules within the CalSAWS System can be configured for Task Creation when documents are imaged into the Hyland imaging tool. These Document Routing Rules can include one or more Program Based Rules which allow for Tasks to be processed and assigned granularly based on specific Program and Program statuses. Many of San Diego County's Program Based Rules for closed program statuses will process Tasks to be assigned to the Most Recent Worker, which evaluates the entire history of assignment for the program resulting in unnecessary Tasks.

## 1.2 Requests

1. Update a set of Document Routing Rules to have the Program Based Rule configuration for closed program statuses limited to a specific lookback timeframe.
2. Modify Program Based Rules as necessary for RE Document Routing Rules to have Sibling Assignment set to No.

## 1.3 Overview of Recommendations

1. Update Document Routing Rule Program Based Rules to evaluate Tasks to be processed based on Program Status and a specific lookback period for assignment for closed programs.
2. Remove Sibling Assignment functionality for Document Routing Rules which create Tasks for renewal documents.

## 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

This section outlines recommendations to update Document Routing Rule Program Based Rule configurations for San Diego County.

### 2.1 Document Routing Rule Detail

#### 2.1.1 Overview

This section describes recommendations to update Document Routing Rule Program Based Rules for San Diego County.

#### 2.1.2 Document Routing Rule Program Based Rule Reference Example

The screenshot shows a web form titled "Document Routing Rule Program Detail". At the top left, a red asterisk icon is followed by the text "\*- Indicates required fields". At the top right, there are two blue buttons: "Save And Return" and "Cancel". The form is divided into a section titled "Program Information" with a blue header. Inside this section, there are several fields: "Program: \*" with a dropdown menu showing "CalFresh"; "Program Status:" with a dropdown menu showing "Active"; "Distribution Type: \*" with a dropdown menu showing "Program Worker and/or Bank"; "Program Worker:" with an empty dropdown menu; "Bank:" with a dropdown menu showing "Closest Bank"; and "Sibling Assignment:" with a dropdown menu showing "No". At the bottom right of the form, there are two more blue buttons: "Save And Return" and "Cancel". At the very bottom, a dark blue footer bar contains the text "This Type 1 page took 0.21 seconds to load."

Figure 2.1.2 -1 – Document Routing Rule Program Based Rule

#### 2.1.3 Description of Changes

1. Update defined Document Routing Rule Program Based Rules to have the Sibling Assignment attribute set to No. Attached file "CA-275304 – SD – Doc Routing Rule Program Rules" in section [3 Supporting Documents](#), worksheet "Doc Rules to Set Sibling to No" lists all Document Routing Rules that this recommendation applies to.
2. For every Document Routing Rule listed within the "Doc Rules to Update Prgrm Rules" worksheet of the attached file "CA-275304 – SD – Doc Routing Rule Program Rules" in section [3 Supporting Documents](#), recreate the Program Based Rules to have an entry for each Program

and Program Status combination listed in the "Program Rule Combinations" worksheet.

3. Implement a rollback data change process that will restore the Document Routing Rule Program Based Rule configurations to the previous state. This rollback data change will be available if unintended results require it to be run.

#### 2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Document Routing Rules

#### 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 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Tasks	Document Routing Rule Program Based Rules configurations	 CA-275304 - SD - Doc Routing Rule Pr



## 4 REQUIREMENTS

---

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	Remove Sibling Assignment functionality for renewal Tasks Document Routing Rules and update Document Routing Rule Program Based Rules to evaluate Tasks to be processed based on Program Status.

## 5 OUTREACH

---

N/A

## 6 APPENDIX

---

N/A

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-276460

Update Logic for No Change SAR 7 Submitted in  
Restoration Month

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu, Robyn Anderson
	Reviewed By	Christopher Vasquez, Gillian Bendicio, William Baretsky, Supritha Sundaram, Chitra Barsagade, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/24/2024	1.0	Initial draft	Shining Liu, Robyn Anderson

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# 1 OVERVIEW

---

## 1.1 Current Design

When a customer submits a No Change SAR 7 late (i.e. in the restoration month; one month after submit month) and the status is "Sent" or "Incomplete", the Customer Reporting List page is updated to "Reviewed – Ready to Run EDBC" via the MarkDocumentReceived API and remains in this status.

When a customer submits a SAR 7, and the status is "Sent" or "Incomplete", but income is found on the case, the status is updated to "Received" and the No Change flag is updated from True to False only when the SAR 7 was submitted via Portal.

In the Imaging system, when a SAR 7 is uploaded, a call is sent to CalSAWS through MarkDocumentReceived API. If there is income on the case, CalSAWS will respond with an "01" code. Imaging will check the Capture information and if the document was uploaded via the Portal, the No Change flag will be updated from True to False. No note is generated in the Notes field.

## 1.2 Requests

When a customer submits a No Change SAR 7 late, the MarkDocumentReceived API will update the Customer Reporting List page to "Received" when the status is "Sent" or "Incomplete". Additionally, when a customer submits a SAR 7 from any source, and income is found on the case, the MarkDocumentReceived API will update the Customer Reporting List page to "Received" when the status is "Sent" or "Incomplete".

In Imaging, when the No Change flag is flipped from True to False, add a note in the Notes field.

## 1.3 Overview of Recommendations

1. Modify the MarkDocumentReceived API to update status of late No Change SAR 7s and SAR 7s with income found on the case to "Received" when the status is "Sent" or "Incomplete".
2. Update Imaging so that when No Change Flag is updated, a note is added to the Notes field.

## 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. If a task has been set up through Document Routing Rules, a task for the worker to manually review late No Change SAR 7s will be generated.
3. This process will be applied to all documents submitted.
4. There is no change to the process of how customers submit SAR 7s.

## 2 RECOMMENDATIONS

---

### 2.1 MarkDocumentReceived API

#### 2.1.1 Overview

MarkDocumentReceived API will mark late No Change SAR 7s "Received" when the status is "Sent" or "Incomplete". Additionally, SAR 7s from any source with income found on the case will be marked "Received" when the status is "Sent" or "Incomplete".

#### 2.1.2 Description of Change

1. When a late No Change SAR 7 is received (i.e. after submit month), MarkDocumentReceived API will mark late No Change SAR 7s "Received" when the status is "Sent" or "Incomplete".
  - a. The capture information can be from any source.
  - b. Return "01" code if the document is a late No Change SAR 7 received.
2. When a SAR 7 is received and income is found on the case, MarkDocumentReceived API will mark the document "Received" when the status is "Sent" or "Incomplete".
  - a. The capture information can be from any source.
  - b. Return "01" code if the document is a SAR 7 with income found on the case.

#### 2.1.3 Partner Integration Testing

End-to-end testing will be performed with Self-Service Portal (SSP) team.

#### 2.1.4 Execution Frequency

Real-time.

#### 2.1.5 Key Scheduling Dependencies

N/A

#### 2.1.6 Counties Impacted

BenefitsCal - Los Angeles and Riverside

Counties using Lobby

Counties using Kiosk

In Office scan – all counties



### **2.1.7 Category**

N/A

### **2.1.8 Data Volume/Performance**

N/A

## **2.2 Imaging System Update**

### **2.2.1 Overview**

Currently, the Imaging system will send a MarkDocumentReceived API call to CalSAWS. If the document is a SAR 7, CalSAWS will check for income on the case. If there is no income, a code of "00" is returned and no further action is taken. If there is income on the case, CalSAWS will respond with a "01" code. This will trigger the Imaging system to update the No Change Flag to False. No note is added to the Notes field indicating the change has taken place. This has led to some confusion by our partners.

The Imaging system will be updated so if the No Change Flag is updated to False, a note, "No Change SAR 7 needs to be reviewed", will be added to the Notes field.

### **2.2.2 Description of Change**

1. Update Imaging so that if the No Change Flag is modified by the system, the note "No Change SAR 7 needs to be reviewed" is added to the Notes field.

### **2.2.3 Partner Integration Testing**

End-to-end testing will be performed with SSP team.

## 2.3 Automated Regression Test

### 2.3.1 Overview

Create automated regression test scripts to verify that the Customer Reporting status is updated appropriately when a No Change SAR 7 is received late from the Self-Service Portal.

### 2.3.2 Description of Change

1. Create regression scripts to verify that when a No Change SAR 7 is received late from the Self-Service Portal, and the current Customer Reporting status is one of the following, the status is updated to 'Received':
  - a. Incomplete
  - b. Sent

**Technical Note:** A scenario should be created for each of these current Customer Reporting status values.
2. Create regression scripts to verify that when a No Change SAR 7 is received late from the Self-Service Portal, and the current Customer Reporting status is not 'Incomplete' or 'Sent', the status is not updated.

**Technical Note:** A scenario should be created for at least one, but not more than three, of the following current Customer Reporting status values:

  - a. Complete- EDBC Accepted
  - b. Completed
  - c. Denied
  - d. Error
  - e. Not Applicable
  - f. Received
  - g. Reviewed
  - h. Reviewed- Ready to Run EDBC

### 3 REQUIREMENTS

---

#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.3	The LRS shall include the ability to exchange LRS Data residing on external systems and communicate the results of any automated LRS Data matches.	SAR 7s that are submitted via Portal are checked for late submission, No Change flag, and income information.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-277324

Add Statewide Welfare Rights Offices from  
Counties to CalSAWS

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	P Madhan Kumar, Chitra Barsagade, Sunitha Sampathkumar, Suneetha Minnekanti

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/11/2024	1.0	Initial Draft	Phong Xiong
08/02/2024	2.0	Updates as per committee feedback	Phong Xiong

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# 1 OVERVIEW

---

## 1.1 Current Design

Currently, only LA County has a Welfare Rights Office listed in CalSAWS. This office is not populated on the NA Back 9.

The MAGI NA Back 9 used for all MC NOAs and forms continue to use the CDSS State Hearings Division, ACAB address.

## 1.2 Requests

1. Add the Welfare Rights offices from all the counties into CalSAWS.
  - a. Populate the Welfare Rights offices on the NA Back 9. As per ACL 23-81, the NA Back 9 "Get Help" section should populate both the legal aid address and statewide welfare rights offices.
2. Update the MAGI NA Back 9 'In-Person' address as per ACWDL 23-19 - ACWDL 17-31. The existing California Department of Social Services State Hearings Division, ACAB address is no longer necessary on the MAGI NA Back 9.
3. Add new addresses for legal aid, welfare rights offices, and hearing addresses in DOC\_DATA to populate on NA Back 9.
4. Modify formatting to the appeals unit information and update Alameda's 1-800 ph. # to 1-800-743-8525.
5. Modify formatting to the Legal Aid Ref. information by re-locating the Ph # to display below the city and zip code for all counties, if not already formatted.

## 1.3 Overview of Recommendations

1. Add Welfare Rights Offices for Counties
2. Update NA Back 9 variable population logic
3. Update MAGI NA Back 9 variable population logic

## 1.4 Assumptions

1. There are no changes to the existing generation logic or variable population logic of the NA BACK 9 and MAGI NA BACK 9 unless specified in this design document.
2. There are no changes to the following NA Back 9s:
  - a. CMSP Form NA Back 9,
  - b. DCFS NA Back 9, and

c. GA/GR NA Back 9



## 2 RECOMMENDATIONS

---

### 2.1 Add Welfare Rights Offices for Counties

#### 2.1.1 Overview

This recommendation will be to update the DOC\_DATA table to add the welfare rights offices to be populated on the NA Back 9s.

#### 2.1.2 Description of Change

1. CTR to the CODE\_DETL table for Category 257 (Correspondence Office Types) to create a new office type of "Welfare Rights Office."
2. DCR to DOC\_DATA to add the new entries for the Welfare Rights offices listed in supporting document #1.
3. Update Alameda County's toll-free phone number to '1-800-743-8525'.
4. DCR to DOC\_DATA to add the following Legal Aid addresses to be populated for Alameda County:
  - a. Bay Area Legal Aid  
Health Consumer Center  
1735 Telegraph Avenue  
Oakland, CA 94612  
855-693-7285
  - b. Homeless Action Center  
2601 San Pablo Avenue  
Oakland, CA 94612  
(510) 695 2260
  - c. Homeless Action Center  
3126 Shattuck Avenue  
Berkeley, CA 94705  
(510) 540 0878

**Note:** The NA Back 9 will populate 5 total Legal Aid addresses for Alameda County (2 from the existing logic, plus the 3 new addresses listed above).

### 2.2 Update NA Back 9 Form Recommendation

#### 2.2.1 Overview

The NA Back 9 is used to notify a customer of their hearing rights and the ability to send the form back to request a hearing.

**State Form:** NA Back 9 (05/22)

**Programs:** CalWORKs, CalFresh, CAPI, Cal-Learn, Welfare-to-Work, and REP

**Attached Forms:** None

**Forms Category:** Forms

**Template Repository Visibility:** All Counties

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

Note: The Hindi, Japanese, Mien, Punjabi, Thai, and Ukrainian versions will only be available in the Template Repository.

## 2.2.2 Form Verbiage

### Update Form XDP

Update the NA Back 9 XDP “To Get Help” text box with the following changes:

1. Separate the text box into 2 separate text boxes.
  - a. The first text box is for the legal aid address.
  - b. The second box is for either additional legal aid addresses that does not fit the first text box, or for Welfare Rights Office addresses if the Welfare Rights Office is different from the legal aid address.

## 2.2.3 Form Variable Population

The variable population logic of the NA Back 9 will have the following updates. Only the updated variables are displayed, all other variables that are pre-populated on the NA Back 9 are not changed and not listed in this design document.

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
1. To Get Help Box 1	Populates with the legal aid address.  This is existing functionality will follow the existing logic for legal aid	Arial Font Size 10	Yes / Text field	Yes	Yes

	address pre-population.				
2. To Get Help Box 2	Populates with the welfare rights office address if it is not the same as the legal aid address. Otherwise, the legal aid address will populate if the county has multiple legal aid addresses.  If there is no welfare rights office address or legal aid address to populate, the box is left blank.	Arial Font Size 10	Yes / Text field	Yes	Yes

**Note:** All phone numbers that are associated to an address is displayed directly after/under the city, state, and zip code of the address.

#### 2.2.4 Form Generation Conditions

There are no changes to the generation conditions of the NA Back 9.

### 2.3 Update MAGI NA Back 9 Form Recommendation

#### 2.3.1 Overview

The MAGI NA Back 9 is used to notify a customer of their hearing rights and the ability to send the form back to request a hearing for Medi-Cal cases.

**State Form:** NA Back 9 (05/22)

**Programs:** Medi-Cal

**Attached Forms:** None

**Forms Category:** Forms

**Template Repository Visibility:** All Counties

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

### 2.3.2 Form Verbiage

This section will follow the updates as mentioned in section 2.2.

### 2.3.3 Form Variable Population

The variable population logic of the MAGI NA Back 9 will have the following updates. Only the updated variables are displayed, all other variables that are pre-populated on the MAGI NA Back 9 are not changed and not listed in this design document.

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation
1. In Person	Populates with the MAGI Hearing Address as listed in the supporting document #1.	Arial Font Size 10	Yes / Text field	Yes	Yes
2. To Get Help Box 1	Populates with the legal aid address.  This is existing functionality will follow the existing logic for legal aid address pre-population.	Arial Font Size 10	Yes / Text field	Yes	Yes
3. To Get Help Box 2	Populates with the welfare rights office address if it is not the same as the legal aid address. Otherwise, the legal aid address will populate if the county has multiple legal aid addresses.	Arial Font Size 10	Yes / Text field	Yes	Yes

	If there is no welfare rights office address or legal aid address to populate, the box is left blank.				
--	---	--	--	--	--

**Note:** All phone numbers are associated to an address is displayed directly after/under the city, state, and zip code of the address.

#### 2.3.4 Form Generation Conditions

There are no changes to the generation conditions of the form.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment
1	Spreadsheet	List of welfare rights office addresses and hearing addresses for MAGI NA Back 9 for all counties	CA-269577 Addresses to be Added.xlsx
2	Forms	NA Back 9 PDF Mockup	NA_Back9_Mockup_EN.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"><li>a. Appointment notices;</li><li>b. Redetermination, Recertification, and/or Annual Agreement notices and forms;</li><li>c. Other scheduling notices (e.g., quality control, GR hearings, and appeals);</li><li>d. Periodic reporting notices;</li><li>e. Contact letters;</li><li>f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site;</li><li>g. Information notices and stuffers;</li><li>h. Case-specific verification/referral forms;</li><li>i. GR Vendor notices;</li><li>k. Court-mandated notices, including Balderas notices;</li><li>l. SSIAP appointment notices;</li><li>m. Withdrawal forms;</li><li>n. COLA notices;</li><li>o. Time limit notices;</li><li>p. Transitioning of aid notices;</li><li>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</li><li>r. Non-compliance and sanction notices;</li><li>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</li><li>t. Corrective NOAs on State Fair Hearing decisions;</li></ul>	Updated NA Back 9 variable population.

	u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	
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# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-277623

Restrict 380 - Paid Family Leave for CalWORKs  
Time Limit Months only

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Sidhant G.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/10/2024	1.0	Initial Version	Jimmy Tu
07/11/2024	1.1	1. Updated as per R6 Comments. 2. Updated this SCR to include changes from SCR CA-204823 to include Immediate Need in program dropdown.	Jimmy Tu

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# 1 OVERVIEW

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## 1.1 Current Design

The Time Limit Monthly batch runs approximately two days before the end of each month and applies the 380 Paid Family Leave time limit exemption for the upcoming month if there is a Paid Family Leave income record on the Income Detail page.

Currently, the Time Limit Monthly batch (PBXXE305) does not check the program field on the Cash Aid Time Limit Month detail page and applies the 380 – Paid Family Leave Exemption for CalWORKs, RCA, Homeless Temp, Homeless Perm and REP.

## 1.2 Requests

1. Update Cash Aid Time Limit Month Detail page to display a new hard validation that will prevent users from adding the '380 – Paid Family Leave' time limit exemption when the 'Program' field is REP or RCA.
1. Update Time Limit Monthly Batch to only apply the '380 – Paid Family Leave' exemption for Cash Aid Time Limit Months with Programs of 'CalWORKs', 'Homeless – Temp', or 'Homeless – Perm'.

## 1.3 Overview of Recommendations

1. Update Cash Aid Time Limit Month Detail page to display a new hard validation that will prevent users from adding the '380 – Paid Family Leave' time limit exemption when the 'Program' field is REP or RCA.
2. Update Time Limit Monthly Batch to only apply the '380 – Paid Family Leave' exemption for Cash Aid Time Limit Months with Programs of 'CalWORKs', 'Homeless – Temp', or 'Homeless – Perm'.

## 1.4 Assumptions

1. Time Limit Exemption of '380 – Paid Family Leave' will not be available for use in CalSAWS until 10/2024.
- ~~2. SCR CA 204823 is adding Immediate Need to the program dropdown on the Cash Aid Time Limit Month Detail page.~~

## 2 RECOMMENDATIONS

### 2.1 Cash Aid Time Limit Month Detail Page

#### 2.1.1 Overview

Currently workers can add the '380 – Paid Family Leave' exemptions on the Cash Aid Time Limit month detail manually for any month from 10/2024 onwards. This SCR will update this page to have a validation preventing workers from adding this exemption when Program field is RCA or REP for the Cash Aid Time Limit Month.

#### 2.1.2 Cash Aid Time Limit Month Detail Page Mockup

##### Cash Aid Time Limit Month Detail

\* - Indicates required fields

Save

Cancel

- **Exception Reason** - The Exemption Reason '380 - Paid Family Leave Exemption' cannot be added for this program.

<b>Name: *</b> DOE, JOHN 24M	<b>Effective Month: *</b> 11/2024	<b>Add Reason: *</b> Manual
<b>Aid Issued By: *</b> Los Angeles	<b>Send to WDTIP? *</b> Yes	<b>Case Number: *</b> L29E6D9 - JOHN DOE
<b>Program: *</b> RCA	<b>Aid Code: *</b> 01 - RCA	

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

Figure 2.1.1 – Cash Aid Time Limit Month Detail Validation - RCA

# Cash Aid Time Limit Month Detail

\*- Indicates required fields

Save

Cancel

• **Exception Reason** - The Exemption Reason '380 - Paid Family Leave Exemption' cannot be added for this program.

**Name: \***  
Doe, John 27M

**Aid Issued By: \***  
Los Angeles

**Program: \***  
REP

**Effective Month: \***  
12/2024

**Send to WDTIP? \***  
Yes

**Aid Code: \***  
30 - CW-All Other Families (Fed)

**Add Reason: \***  
Manual

**Case Number: \***  
B21Z126 - John Doe

Exceptions

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

Add

Figure 2.1.2 – Cash Aid Time Limit Month Detail Validation - REP

# Cash Aid Time Limit Month Detail

\*- Indicates required fields

Save

Cancel

**Name: \***  
Doe, John 27M

**Aid Issued By: \***  
Los Angeles

**Program: \***  
Immediate Need

**Effective Month: \***  
12/2024

**Send to WDTIP? \***  
Yes

**Aid Code: \***  
30 - CW-All Other Families (Fed)

**Add Reason: \***  
Manual

**Case Number: \***  
B21Z126 - John Doe

Reason

Clocks

Created By

380 - Paid Family Leave Exemption

Add

Figure 2.1.3 – Cash Aid Time Limit Month – Immediate Need in Program Dropdown

## 2.1.3 Description of Changes

1. Update Cash Aid Time Limit Month Detail page to display a new hard validation that will prevent users from adding the '380 - Paid Family Leave' time limit exemption when the 'Program' field is REP or RCA.

a. Validation:

- i. Exception Reason – The Exemption Reason '380 – Paid Family Leave Exemption' cannot be added for this program.

2. Update Cash Aid Time Limit Month Detail page to include 'Immediate Need' in the program field dropdown.

#### 2.1.4 Page Location

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

#### 2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

#### 2.1.6 Page Mapping

No Change.

#### 2.1.7 Accessibility

No Change.

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

No Change.



## **2.2 Time Limit Monthly Batch (PBXXE305)**

### **2.2.1 Overview**

The Time Limit Monthly batch runs approximately two days before the end of each month and applies the 380 Paid Family Leave time limit exemption for the upcoming month if there is a Paid Family Leave income record on the Income Detail page.

### **2.2.2 Description of Change**

1. Update Time Limit Monthly Batch to only apply the '380 – Paid Family Leave' exemption for Cash Aid Time Limit Months with Programs of 'CalWORKs', 'Homeless – Temp', 'Homeless – Perm', or 'Immediate Need'.
  - a. Note: Time Limit Monthly Batch will not apply '380 – Paid Family Leave' exemption to Cash Aid Time Limit Months for RCA and REP programs.

### **2.2.3 Execution Frequency**

No Change.

### **2.2.4 Key Scheduling Dependencies**

No Change.

### **2.2.5 Counties Impacted**

No Change.

### **2.2.6 Category**

No Change.

### **2.2.7 Data Volume/Performance**

No Change.

### **2.2.8 Failure Procedure/Operational Instructions**

No Change. Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment

### 4 REQUIREMENTS

---

#### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

### 5 OUTREACH

---

N/A.

### 6 APPENDIX

---

N/A.

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-277974

ACWDL 24-09 - Children's Presumptive Eligibility &  
The Newborn Gateway

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Phong Xiong
	Reviewed By	[individual(s) from Build and Test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/24/2024	1.0	Initial Draft	Phong Xiong

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# 1 OVERVIEW

---

## 1.1 Current Design

Effective July 1, 2024, CHDP will sunset. After the sunset of CHDP on July 1, 2024, County Eligibility Workers (CEWs) will no longer explain the CHDP Program, offer and trigger a referral in SAWS, or reference the program within case comments. Use of CHDP Program flyers should be discontinued after July 1, 2024.

## 1.2 Requests

Remove Referral reference of CHDP. Note: CA-279292 will update CHDP references in Forms.

Remove the PUB 183/PUB 184 and MC 003 from all Medi-Cal Renewal packets and Informing Notices (Informational packets).

Remove the following CHDP from Template Repository:

- PA 6082 – CHDP Contact Letter (LA County specific)
- PM 357 – CHDP Referral (All Counties)
- PUB 183 – CHDP Information (All Counties)
- MC 003 - Early Periodic Screening, Diagnostic, and Treatment (EPSDT) (All Counties)

## 1.3 Overview of Recommendations

1. Remove the PUB 183/PUB 184 and MC 003 from all Medi-Cal Renewal packets, Informing Notices (Informational packets), CW RE Packet, and CW/CF RE Packet).
2. Remove the following CHDP from Template Repository:
  - a. PA 6082 – CHDP Contact Letter (LA County specific)
  - b. PM 357 – CHDP Referral (All Counties)
  - c. PUB 183 – CHDP Information (All Counties)
  - d. MC 003 - Early Periodic Screening, Diagnostic, and Treatment (EPSDT) (All Counties)

## 1.4 Assumptions

1. There are no changes to forms/packets in this effort unless otherwise stated in the recommendation section of this design document.
2. There are no batch and online triggers for the PA 6082 and PM 357 forms. These forms only exist in the Template Repository.
3. CA-279292 will update CHDP references in Forms not included in this SCR.

## 2 RECOMMENDATIONS

---

### 2.1 Update to the Existing MAGI RE Packet Recommendation

#### 2.1.1 Overview

This effort is to update the MAGI RE Packet to remove CHDP forms.

**State Form:** N/A – Packet (DOC\_TEMPL\_ID: 6682, 6685)

**Current Programs:** Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Application

**Current Template Repository Visibility:** LA County, Migration Counties

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

#### 2.1.2 Form Verbiage

##### Update Form XDP

The MAGI RE Packet for LA County and Migration Counties will be updated to remove the following forms:

- PUB 183
- PUB 184 (Only for Spanish versions and for Migration Counties)
- MC 003

Note: DCR to DOC\_TEMPL.TEMPL\_DESCR to remove references to the forms being removed.

#### 2.1.3 Form Variable Population

There are no changes to the form variable population logic.

#### 2.1.4 Form Generation Conditions

There are no changes to the generation conditions.

### 2.2 Updates to the Existing Non-MAGI RE Packet Recommendation

#### 2.2.1 Overview

This effort is to update the Non-MAGI RE Packet to remove CHDP forms.



**State Form:** N/A – Packet (DOC\_TEMPL\_ID: 6683, 6686)

**Current Programs:** Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Application

**Current Template Repository Visibility:** LA County, Migration Counties

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

### 2.2.2 Form Verbiage

#### Update Form XDP

The Non-MAGI RE Packet for LA County and Migration Counties will be updated to remove the following forms:

- PUB 183
- PUB 184 (Only for Spanish versions and for Migration Counties)
- MC 003

Note: DCR to DOC\_TEMPL.TEMPL\_DESCR to remove references to the forms being removed.

### 2.2.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.2.4 Form Generation Conditions

There are no changes to the generation conditions.

## 2.3 Updates to the Existing Mixed Household RE Packet Recommendation

### 2.3.1 Overview

This effort is to update the Mixed Household RE Packet to remove CHDP forms.

**State Form:** N/A – Packet (DOC\_TEMPL\_ID: 6684, 6687)

**Current Programs:** Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Application

**Current Template Repository Visibility:** LA County, Migration Counties

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

### 2.3.2 Form Verbiage

#### Update Form XDP

The Mixed Household RE Packet for LA County and Migration Counties will be updated to remove the following forms:

- PUB 183
- PUB 184 (Only for Spanish versions and for Migration Counties)
- MC 003

Note: DCR to DOC\_TEMPL.TEMPL\_DESCR to remove references to the forms being removed.

### 2.3.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.3.4 Form Generation Conditions

There are no changes to the generation conditions.

## 2.4 Updates to the Existing MAGI Beneficiary Household Packet Recommendation

### 2.4.1 Overview

This effort is to update the MAGI Beneficiary Household Packet to remove CHDP references.

**State Form:** N/A – Packet (DOC\_TEMPL\_ID: 6886)

**Current Programs:** Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Application

**Current Template Repository Visibility:** All Counties

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

### 2.4.2 Form Verbiage

#### Update Form XDP

The MAGI Beneficiary Household Packet will be updated to remove the following forms:

- PUB 183
- MC 003

Note: DCR to DOC\_TEMPL.TEMPL\_DESCR to remove references to the forms being removed.

Update the first page of the MAGI Beneficiary Household Packet to remove references

### 2.4.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.4.4 Form Generation Conditions

There are no changes to the generation conditions.

## 2.5 Updates to the Existing CW RE Packet Recommendation

### 2.5.1 Overview

This effort is to update the CW RE Packet to remove the CHDP forms.

**State Form:** N/A – Packet (DOC\_TEMPL\_ID: 6543)

**Current Programs:** CalWORKs

**Current Attached Form(s):** None

**Current Forms Category:** Application

**Current Template Repository Visibility:** Migration Counties

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

### 2.5.2 Form Verbiage

#### Update Form XDP

The CW RE Packet will be updated to remove the following forms:

- PUB 183
- PUB 184 (Only for Spanish versions)

Note: DCR to DOC\_TEMPL.TEMPL\_DESCR to remove references to the forms being removed.

### 2.5.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.5.4 Form Generation Conditions

There are no changes to the generation conditions.

## 2.6 Updates to the Existing CW-CF RE Packet Recommendation

### 2.6.1 Overview

This effort is to update the CW-CF RE Packet to remove the CHDP forms.

**State Form:** N/A – Packet (DOC\_TEMPL\_ID: 6544)

**Current Programs:** CalWORKs, CalFresh

**Current Attached Form(s):** None

**Current Forms Category:** Application

**Current Template Repository Visibility:** Migration Counties

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

### 2.6.2 Form Verbiage

#### Update Form XDP

The CW-CF RE packet will be updated to remove the following forms:

- PUB 183
- PUB 184 (Only for Spanish versions)

Note: DCR to DOC\_TEMPL.TEMPL\_DESCR to remove references to the forms being removed.

### 2.6.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.6.4 Form Generation Conditions

There are no changes to the generation conditions.

## 2.7 Updates to the Existing PUB 183 Form Recommendation

### 2.7.1 Overview

This effort is to obsolete the PUB 183 form.

**State Form:** PUB 183 (09/15) (DOC\_TEMPL\_ID: 5326)

**Current Programs:** CalWORKs, CalFresh, Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All Counties

**Existing Languages:** English, Spanish

### 2.7.2 Form Verbiage

There are no changes to the form verbiage.

### 2.7.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.7.4 Form Generation Conditions

#### 1. Updates to Form Generation

Obsolete this form from the Template Repository.

## 2.8 Updates to the Existing MC 003 Form Recommendation

### 2.8.1 Overview

This effort is to obsolete the MC 003 form.

**State Form:** MC 003 (11/12) (DOC\_TEMPL\_ID: 5371)

**Current Programs:** Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All Counties

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

### 2.8.2 Form Verbiage

There are no changes to the form verbiage.

### 2.8.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.8.4 Form Generation Conditions

#### 1. Updates to Form Generation

Obsolete this form from the Template Repository.

## 2.9 Updates to the Existing PA 6082 Form Recommendation

### 2.9.1 Overview

This effort is to obsolete the PA 6082 form.

**State Form:** N/A – LA County Specific Form (DOC\_TEMPL\_ID: 5036)

**Current Programs:** Medi-Cal

**Current Attached Form(s):** None

**Current Forms Category:** Forms

**Current Template Repository Visibility:** LA County

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

### 2.9.2 Form Verbiage

There are no changes to the form verbiage.

### 2.9.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.9.4 Form Generation Conditions

#### 1. Updates to Form Generation

Obsolete the form from the Template Repository.

## 2.10 Updates to the Existing PM 357 Form Recommendation

### 2.10.1 Overview

This effort is to obsolete the PM 357 form.

**State Form:** PM 357 (10/2007) (DOC\_TEMPL\_ID: 5113)

**Current Programs:** CalWORKs, Medi-Cal, General Assistance

**Current Attached Form(s):** None

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All Counties

**Existing Languages:** English

### 2.10.2 Form Verbiage

There are no changes to the form verbiage.

### 2.10.3 Form Variable Population

There are no changes to the form variable population logic.

### 2.10.4 Form Generation Conditions

#### 1. Updates to Form Generation

Obsolete the form from the Template Repository.

### 3 SUPPORTING DOCUMENTS

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Number	Functional Area	Description	Attachment



## 4 REQUIREMENTS

### 4.1 Project Requirements

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

	u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	
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# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-280073

SF – CAAP GAGR COLA Change Effective  
10/01/2024

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/30/2024	1.0	Initial Draft	T. Lazio
08/14/2024	2.0	Grant Amounts and In-Kind Values updated based on corrected rates provided by SFO County. See highlighted changes in Sections 2.1.2.2 and 2.2.2.2.	T. Lazio

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# 1 OVERVIEW

---

Update values used in the GA/GR Automated Solution program for San Francisco County for the fiscal year starting October 2024.

## 1.1 Current Design

San Francisco County is using the prior GA/GR Automated Solution program grant and In-Kind Income amounts effective October 1, 2023, that were implemented with SCR CA- 265104.

## 1.2 Requests

Effective October 2024, San Francisco County will be implementing the COLA grant and In-Kind Income increases for the GA/GR Automated Solution program.

## 1.3 Overview of Recommendations

1. DCR to add the new San Francisco County GA/GR Automated Solution program benefit grant amounts effective October 1, 2024, for household sizes 1 and 2 in the grant admin table, and end-date the corresponding records from the previous fiscal year.
2. CTCR to add the new San Francisco County In-Kind Income Amounts effective October 1, 2024, and end-date the records from the previous fiscal year.

## 1.4 Assumptions

1. This SCR is only updating the table amounts used in determining GA/GR grant amounts. It is not changing the logic that is used to determine GA/GR grant amounts.
2. SCR CA-280398 is created to run Batch EDBC on cases with active GA/GR programs in San Francisco that will receive the COLA adjustment.

## 2 RECOMMENDATIONS

### 2.1 Eligibility: Update Grant Amounts in Admin Table

#### 2.1.1 Overview

Create and apply a DCR to insert the new San Francisco County GA/GR Automated Solution program benefit grant amounts effective October 1, 2024, for household sizes 1 and 2, and end-date the corresponding records from the previous fiscal year.

These values may be viewed in the CalSAWS application by navigating to Admin Tools->Admin, in the lefthand menu under GA/GR County Admin clicking Grants/Income, and on the Grants & Income Detail page clicking to expand the Grant Limits section.

#### 2.1.2 Description of Changes

1. Set the End Date to **09/30/2024** on the following grant amount records in the County Admin Table (COUNTY\_PARAMTR\_ADMIN) for San Francisco County:

COUNTY CODE	CAT CODE	TYPE CODE	ITEM CODE	VAL	VAL TYPE CODE	BEG DATE	END DATE
38	GL	AJ	AC	576	DR	10/1/2023	<b>12/31/9999</b>
38	GL	AJ	AD	712	DR	10/1/2023	<b>12/31/9999</b>
38	GL	AK	AC	1033	DR	10/1/2023	<b>12/31/9999</b>
38	GL	AK	AD	1168	DR	10/1/2023	<b>12/31/9999</b>

2. Insert new grant amount records in the County Admin Table (COUNTY\_PARAMTR\_ADMIN) for San Francisco County as shown below

COUNTY CODE	CAT CODE	TYPE CODE	ITEM CODE	VAL	VAL TYPE CODE	BEG DATE	END DATE
38	GL	AJ	AC	<b>578</b>	DR	<b>10/1/2024</b>	12/31/9999
38	GL	AJ	AD	<b>714</b>	DR	<b>10/1/2024</b>	12/31/9999
38	GL	AK	AC	<b>1036</b>	DR	<b>10/1/2024</b>	12/31/9999
38	GL	AK	AD	<b>1172</b>	DR	<b>10/1/2024</b>	12/31/9999

Technical Note:

- CAT\_CODE
  - GL = "Grant Limits"
- TYPE\_CODE
  - AJ = "One Household Member"
  - AK = "Two Household Members"
- ITEM\_CODE
  - AC = "Grant Amount"
  - AD = "Exempt Grant Amount"

## 2.2 Eligibility: Update In-Kind Income Chart

### 2.2.1 Overview

Create and apply a CTCR to insert the new San Francisco County GA/GR In-Kind Income Amounts effective October 1, 2024, and end-date the records from the previous fiscal year (Code Table 10688).

### 2.2.2 Description of Changes

1. Set the End Date to **09/30/2024** on the following In-Kind Income records for San Francisco County:

CATGRY ID	CODE NUM IDENTIF	SHORT DECODE NAME	LONG DECODE NAME	ORDR BY NUM	BEG DATE	END DATE	REFER TABLE_1 DESCR	REFER TABLE_2 DESCR	REFER TABLE_3 DESCR	REFER TABLE_4 DESCR	REFER TABLE_5 DESCR	REFER TABLE_6 DESCR	REFER TABLE_7 DESCR	REFER TABLE_8 DESCR	REFER TABLE_9 DESCR
10688	M9	Utilities - Earned	Utilities - Earned	0	10/01/2023	12/31/9999	38	1	37	R1	82	576	576	603	479
10688	N1	Clothing - Earned	Clothing - Earned	0	10/01/2023	12/31/9999	38	1	95	R1	65	576	576	603	479
10688	R2	Housing - Earned	Housing - Earned	0	10/01/2023	12/31/9999	38	1	97	R1	391	576	576	603	479
10688	R6	Food - Earned	Food - Earned	0	10/01/2023	12/31/9999	38	1	93	R1	214	576	576	603	479
10688	ZA	Clothing - Unearned	Clothing - Unearned	0	10/01/2023	12/31/9999	38	1	94	R1	65	576	576	603	479
10688	ZB	Housing - Unearned	Housing - Unearned	0	10/01/2023	12/31/9999	38	1	96	R1	391	576	576	603	479
10688	ZC	Utilities - Unearned	Utilities - Unearned	0	10/01/2023	12/31/9999	38	1	36	R1	82	576	576	603	479
10688	J7	Food - Unearned	Food - Unearned	0	10/01/2023	12/31/9999	38	1	92	R1	214	576	576	603	479
10688	L7	Clothing - Earned	Clothing - Earned	0	10/01/2023	12/31/9999	38	2	95	R1	128	1033	1033	941	834
10688	M3	Utilities - Earned	Utilities - Earned	0	10/01/2023	12/31/9999	38	2	37	R1	95	1033	1033	941	834



CATGRY ID	CODE NUM IDENTIF	SHORT DECODE NAME	LONG DECODE NAME	ORDR BY NUM	BEG DATE	END DATE	REFER TABLE_1 DESCR	REFER TABLE_2 DESCR	REFER TABLE_3 DESCR	REFER TABLE_4 DESCR	REFER TABLE_5 DESCR	REFER TABLE_6 DESCR	REFER TABLE_7 DESCR	REFER TABLE_8 DESCR	REFER TABLE_9 DESCR
10688	R7	Food - Earned	Food - Earned	0	10/01/2023	12/31/9999	38	2	93	R1	457	1033	1033	941	834
10688	S2	Housing - Earned	Housing - Earned	0	10/01/2023	12/31/9999	38	2	97	R1	520	1033	1033	941	834
10688	ZD	Clothing - Unearned	Clothing - Unearned	0	10/01/2023	12/31/9999	38	2	94	R1	128	1033	1033	941	834
10688	ZE	Housing - Unearned	Housing - Unearned	0	10/01/2023	12/31/9999	38	2	96	R1	520	1033	1033	941	834
10688	ZF	Utilities - Unearned	Utilities - Unearned	0	10/01/2023	12/31/9999	38	2	36	R1	95	1033	1033	941	834
10688	E4	Food - Unearned	Food - Unearned	0	10/01/2023	12/31/9999	38	2	92	R1	457	1033	1033	941	834

2. Insert the following high-dated In-Kind Income records for San Francisco County:

CATGRY ID	CODE NUM IDENTIF	SHORT DECODE NAME	LONG DECODE NAME	ORDR BY NUM	BEG DATE	END DATE	REFER TABLE_1 DESCR	REFER TABLE_2 DESCR	REFER TABLE_3 DESCR	REFER TABLE_4 DESCR	REFER TABLE_5 DESCR	REFER TABLE_6 DESCR	REFER TABLE_7 DESCR	REFER TABLE_8 DESCR	REFER TABLE_9 DESCR
10688	M9	Utilities - Earned	Utilities - Earned	0	10/01/2024	12/31/9999	38	1	37	R1	86	714	714	605	481
10688	N1	Clothing - Earned	Clothing - Earned	0	10/01/2024	12/31/9999	38	1	95	R1	68	714	714	605	481
10688	R2	Housing - Earned	Housing - Earned	0	10/01/2024	12/31/9999	38	1	97	R1	408	714	714	605	481
10688	R6	Food - Earned	Food - Earned	0	10/01/2024	12/31/9999	38	1	93	R1	223	714	714	605	481
10688	ZA	Clothing - Unearned	Clothing - Unearned	0	10/01/2024	12/31/9999	38	1	94	R1	68	714	714	605	481
10688	ZB	Housing - Unearned	Housing - Unearned	0	10/01/2024	12/31/9999	38	1	96	R1	408	714	714	605	481
10688	ZC	Utilities - Unearned	Utilities - Unearned	0	10/01/2024	12/31/9999	38	1	36	R1	86	714	714	605	481
10688	J7	Food - Unearned	Food - Unearned	0	10/01/2024	12/31/9999	38	1	92	R1	223	714	714	605	481

CATGRY ID	CODE NUM IDENTIF	SHORT DECODE NAME	LONG DECODE NAME	ORDR BY NUM	BEG DATE	END DATE	REFER TABLE_1 DESCR	REFER TABLE_2 DESCR	REFER TABLE_3 DESCR	REFER TABLE_4 DESCR	REFER TABLE_5 DESCR	REFER TABLE_6 DESCR	REFER TABLE_7 DESCR	REFER TABLE_8 DESCR	REFER TABLE_9 DESCR
10688	L7	Clothing - Earned	Clothing - Earned	0	10/01/2024	12/31/9999	38	2	95	R1	132	1172	1172	944	836
10688	M3	Utilities - Earned	Utilities - Earned	0	10/01/2024	12/31/9999	38	2	37	R1	99	1172	1172	944	836
10688	R7	Food - Earned	Food - Earned	0	10/01/2024	12/31/9999	38	2	93	R1	477	1172	1172	944	836
10688	S2	Housing - Earned	Housing - Earned	0	10/01/2024	12/31/9999	38	2	97	R1	541	1172	1172	944	836
10688	ZD	Clothing - Unearned	Clothing - Unearned	0	10/01/2024	12/31/9999	38	2	94	R1	132	1172	1172	944	836
10688	ZE	Housing - Unearned	Housing - Unearned	0	10/01/2024	12/31/9999	38	2	96	R1	541	1172	1172	944	836
10688	ZF	Utilities - Unearned	Utilities - Unearned	0	10/01/2024	12/31/9999	38	2	36	R1	99	1172	1172	944	836
10688	E4	Food - Unearned	Food - Unearned	0	10/01/2024	12/31/9999	38	2	92	R1	477	1172	1172	944	836

Technical Note:

Code Table 10688 Reference Table Columns:

- REFER\_TABLE\_1\_DESCR = County Code
- REFER\_TABLE\_2\_DESCR = Household Size
- REFER\_TABLE\_3\_DESCR = Income Type (values in Short/Long Decode Name columns from CT 186)
  - 36 - Utilities - Unearned
  - 37 - Utilities - Earned
  - 92 - Food - Unearned
  - 93 - Food - Earned
  - 94 - Clothing - Unearned
  - 95 - Clothing - Earned
  - 96 - Housing - Unearned
  - 97 - Housing - Earned

Code Table 10688 Reference Table Columns (Conti):

- REFER\_TABLE\_4\_DESCR = Region
- REFER\_TABLE\_5\_DESCR = In-kind Chart Amount
- REFER\_TABLE\_6\_DESCR = Other
- REFER\_TABLE\_7\_DESCR = Stabilization
- REFER\_TABLE\_8\_DESCR = SSIP/CALM/PAES/AGEX
- REFER\_TABLE\_9\_DESCR = GA/GR

**Programs Impacted**

GA/GR Automated Solution

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1163	The LRS shall be capable of handling several types of mass updates, including table changes and regulatory changes.	This SCR will update the COLA values for San Francisco County GA/GR Automated Solution Program.



California Statewide Automated Welfare System

## **Design Document**

CA-280285

Update Batch MAGI Skips and Page Validations  
for Invalid Characters in Address and Citizenship  
First/Middle/Last Name

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Renee Gustafson
	Reviewed By	Max Volf, Dylan Patel, Geetha Ramalingam

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/01/2024	.01	Original Draft	Renee
08/02/2024	.02	Reviewed updated draft with MC Analysts and incorporated feedback	Renee
08/06/2024	.03	Added exclusion portion to October RE population since the initial EDRs would have been sent on 8/1 and the DCR is running on 8/8	Renee

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# 1 OVERVIEW

During the CalWIN to CalSAWS migration, Electronic Healthcare Interface Transaction (eHIT) schema updates were put on hold. However, CalHEERS continued to make updates within their system that should be communicated with SAWS. Since CalWIN to CalSAWS migration is complete, CalSAWS and CalHEERS can resume eHIT schema updates.

Certain values in data elements cause CalHEERS MEDS transactions to fail. As a result, CalHEERS has added restrictions on how those data elements can be communicated through eHIT.

This SCR will update CalSAWS in support of the changes in eHIT with CalHEERS Change Requests (CR) 178286 and 248898.

## 1.1 Current Design

With SCR CA-257780, the eHIT schema v19 was updated so that the EDR and Disposition requires name fields to meet specific patterns. If any of these fields do not match the expected pattern, then the EDR or Disposition will fail for an Acknowledgement Error.

The MAGI Determination List page was updated to prevent invalid characters for First/Middle/Last name based on the name values in Individual Demographics page, but it didn't include a check to the Name values in the Citizenship Status Detail page.

### MAGI Determination List

\*- Indicates required fields

**A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:**

- **First or Last Name can only include characters: A-Z, space, hyphen, or apostrophe. Invalid characters found for the following person(s):**
  - Janic3 Koff/man
  - ..... .....

#### Request MAGI Determination

Begin Month: \*

05/2023

End Month: \*

10/2023

Program Identifier: \*

Medi-Cal

Life Change Event:

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

## MAGI Determination List

\*- Indicates required fields

**A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:**

- Middle Name must begin with a letter and can only include characters: A-Z, space, hyphen, or apostrophe. Invalid characters found for the following person(s):**
  - Janice / Koffman

### Request MAGI Determination

**Begin Month: \***  
05/2023

**End Month: \***  
10/2023

**Program Identifier: \***  
Medi-Cal

**Life Change Event:**

☐ Bypass Primary Contact Matching Criteria  
☐ Request Lift Options  
☐ Request Negative Action Determination  
☐ Restart VLP e-Verification

Request MAGI

If the record in the Citizenship page has invalid characters, including a leading or trailing spaces in the person's name, the EDR will fail with an ACK Error informing the user to contact help desk.

Additionally, the eHIT Schema v19 added schema validations for Address Line 1 and 2 to not allow certain special characters.

A page validation and a Batch MAGI Skip was added to prevent sending an EDR if the Address Line 1 or Address Line 2 have any character not allowed.

Below are the allowable characters:

- Alphabetical letter (A-Z)
- Numerical character (0-9)
- Comma (,)
- Forward slash (/)
- Hyphen (-)
- Pound (#)
- Space ( )

## MAGI Determination List

\*- Indicates required fields

**A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:**

- Address Line 1 and Address Line 2 can only contain the following characters: A-Z, 0-9, space, hyphen, comma, pound, or forward slash. Invalid characters for the following person(s):
  - Person One

### Request MAGI Determination

**Begin Month: \***

05/2023

**End Month: \***

10/2023

**Program Identifier: \***

Medi-Cal

**Life Change Event:**

☐ Bypass Primary Contact Matching Criteria
 ☐ Request Lift Options
 ☐ Request Negative Action Determination
 ☐ Restart VLP e-Verification

Request MAGI

A period (.) is an allowable special character but since this is not in the allowable list, the page validation and Batch MAGI Skip prevented sending the EDR when there is an address with a period. For example: "P.O. Box" will be prevented.

## 1.2 Requests

1. Update the MAGI Determination List page validation and Batch MAGI Skip for checking the allowable characters in an individual's name to also check the Citizenship Status Detail page.
2. Update the outbound eHIT logic to strip the extra spaces for Name fields in an EDR.
3. Update the MAGI Determination List page validation and Batch MAGI Skip to no longer treat a period as a disallowed character in Address Line 1 and 2.
4. Create a one-time data change to re-attempt to send the RE EDRs for programs with Renewal Due September and October 2024 skipped for 'Address Line 1 and/or Address Line 2 contains invalid characters'.

## 1.3 Overview of Recommendations

1. Update the MAGI Determination List page validations that check for invalid characters for First, Middle and Last Name to also check the Citizenship Status Detail page. Update the MAGI Determination List page validations for Address Line 1 and Address Line 2 to consider a period (.) an allowable character.

2. Update the Batch MAGI Skips that check for invalid characters for First, Middle and Last Name to also check the Citizenship Status Detail page. Update the Batch MAGI Skips for Address Line 1 and Address Line 2 to consider a period (.) an allowable character.
3. Update eHIT Outbound logic to strip any leading and trailing spaces on the Person Name fields in an EDR for both the 'Person Demographic Information' and the 'Document' sections and in the Disposition for the 'Primary Applicant Full Name' section.
4. Create a one-time DCR to send an automated Renewal EDR for programs skipped in Batch MAGI due to either a Period (.) in the address or programs that erred out due to an extraneous space character in the name in the 'Batch MAGI Redetermination EDR' run for the September and October 2024 Renewal programs.

## 1.4 Assumptions

1. September 2024 Renewal Medi-Cal programs that were skipped in July for 'Address Line 1 and/or Address Line 2 contains invalid characters' will not be pulled in for re-processing if the worker has processed anything on the program. This means if there was a Medi-Cal EDBC run, or a new EDR sent since 07/02/2024, or if the Renewal Packet status is 'Incomplete', 'Received' or 'Reviewed – Ready to Run EDBC' the case, then the program will be excluded from attempted re-processing. Workers will follow existing county business process to complete the renewal or process the packet.
2. For September 2024 Renewal Medi-Cal programs that are MAGI only: If the RE DER returns on 08/09/2024 with all MAGI individuals as MAGI Eligible/Conditionally Eligible without soft pause or 8E, the automated MAGI renewal EDBC batch sweep (PB00E120) will pick up the case for Batch EDBC processing on 8/10. On 8/10, Batch EDBC will authorize the renewal, advance the RE Due Date and generate the Renewal NOA. SCR CA-281154 will update the September RE Packet status to 'N/A' for these programs. CA-281154 is planned for 8/13/2024.

## 2 RECOMMENDATIONS

### 2.1 MAGI Determination List Page

#### 2.1.1 Overview

Update the MAGI Determination List page validations that check for invalid characters for First, Middle and Last Name to also check the Citizenship Status Detail page. Update the MAGI Determination List page validations for Address Line 1 and Address Line 2 to consider a period (.) as an allowable character.

#### 2.1.2 MAGI Determination Detail Mockup

**MAGI Determination List**

\* Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- First or Last Name can only include characters: A-Z, space, hyphen, or apostrophe. Invalid characters found in the Individual Demographics page, and/or Document First Name or Document Last Name in Citizenship Status Detail page for the following person(s):
  - Blue Mc.Berry

**Request MAGI Determination**

Begin Month: \* 07/2024 ▼ End Month: \* 12/2024 ▼

Program Identifier: \* Medi-Cal ▼

Life Change Event: ▼

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

##### 2.1.2.1 First or Last Name Validation

## MAGI Determination List

\*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Middle Name must begin with a letter and can only include: A-Z, space, hyphen, or apostrophe. Invalid characters found in the Individual Demographics, and/or Document Middle Name in Citizenship Status Detail page for the following person(s):
  - Blue Berry

### Request MAGI Determination

Begin Month: \*

07/2024 ▼

End Month: \*

12/2024 ▼

Program Identifier: \*

Medi-Cal ▼

Life Change Event:

▼

- ☐ Bypass Primary Contact Matching Criteria
- ☐ Request Lift Options
- ☐ Request Negative Action Determination
- ☐ Restart VLP e-Verification

Request MAGI

## 2.1.2.2 Middle Name Validation

## MAGI Determination List

\*- Indicates required fields

A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range:

- Address Line 1 and Address Line 2 can only contain the following characters: A-Z, 0-9, space, period, hyphen, comma, pound, or forward slash. Invalid characters found for the following person(s):
  - Blue Berry

### Request MAGI Determination

Begin Month: \*

07/2024 ▼

End Month: \*

12/2024 ▼

Program Identifier: \*

Medi-Cal ▼

Life Change Event:

▼

- ☐ Bypass Primary Contact Matching Criteria
- ☐ Request Lift Options
- ☐ Request Negative Action Determination
- ☐ Restart VLP e-Verification

Request MAGI

## 2.1.2.3 Address Line 1 and Address Line 2 Validation

### 2.1.3 Description of Changes

1. Update the existing page validation that prevents a worker from sending an EDR when at least one individual in the EDR has a First Name or Last Name containing any character that is not an allowable character in the Individual Demographics to also check the Citizenship Status Detail page. *(Refer to figure 2.1.2.1.)*
  - a. **Criteria:** At least one individual on the MAGI Request has any character not listed below in the First Name or Last Name field on the Individual Demographic Detail and/or the Document First Name or Document Last Name in the Citizenship Status Detail pages:
    - i. Alphabetical letter (A-Z)
    - ii. Apostrophe (')
    - iii. Hyphen (-)
    - iv. Space ( )
  - b. **Validation Message:** A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range: First or Last Name can only include characters: A-Z, space, hyphen, or apostrophe. Invalid characters found in the Individual Demographics page, and/or Document First Name or Document Last Name in Citizenship Status Detail page for the following person(s): <Person Name>

This is a hard validation.

2. Update existing page validation that prevents a worker from sending an EDR when at least one individual on the EDR has a Middle Name containing any character that is not an allowable character, or if the Name does not start with an alphabetical letter in Individual Demographics to also check the Citizenship Status Detail page. *(Refer to figure 2.1.2.2)*
  - a. **Criteria:** At least one individual on the MAGI Request has a Middle Name entered on the Individual Demographics and/or the Document Middle Name in Citizenship Status Detail page and the initial character is not an alphabetical letter, or it contains any character other than what is listed below:
    - i. Alphabetical letter (A-Z)
    - ii. Apostrophe (')
    - iii. Hyphen (-)
    - iv. Space ( )
  - b. **Validation Message:** A MAGI Determination cannot be sent. The following minimum requirement(s) are not met in this month range: Middle Name must begin with a letter and can only include: A-Z, space, hyphen, or apostrophe. Invalid characters found in the Individual Demographics, and/or Document Middle in Citizenship Status Detail page for the following person(s): <Person Name>

This is a hard validation.

3. Update the existing page validation that prevents a worker from sending an EDR when at least one individual on the EDR has an Address entered containing an unallowable character in the Address fields to consider a period (.) as an allowable character. (Refer to figure 2.2.2.3)

- a. **Criteria:** At least one individual on the MAGI Request has an address entered on Address Line 1 or Address Line 2 on the Contact Detail page and the address contains any character that is not listed below:

- i. Alphabetical letter (A-Z)
- ii. Numerical character (0-9)
- iii. Comma (,)
- iv. Forward slash (/)
- v. Hyphen (-)
- vi. Pound (#)
- vii. Space ( )
- viii. Period (.)

- b. **Validation Message:** A MAGI Determination Request cannot be sent. The following minimum requirement(s) are not met in this month range: Address Line 1 and Address Line 2 can only contain the following characters: A-Z, 0-9, space, period, hyphen, comma, pound, or forward slash. Invalid characters found for the following person(s): <Person Name>.

This is a hard validation.

#### 2.1.4 Page Location

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

#### 2.1.5 Security Updates

N/A

#### 2.1.6 Page Mapping

N/A

#### 2.1.7 Accessibility

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



### 2.1.8 Page Usage/Data Volume Impacts

N/A

## 2.2 Batch MAGI

### 2.2.1 Overview

Update the Batch MAGI Skips that check for invalid characters for First, Middle and Last Name to also check the Citizenship Status Detail page. Update the Batch MAGI Skips for Address Line 1 and Address Line 2 to consider a period (.) an allowable character.

### 2.2.2 Description of Change

1. Update Batch MAGI skip logic to skip a case for 'First or Last Name contains invalid characters' (CT707\_IF) when at least one individual in the EDR has a First or Last Name with invalid characters in Individual Demographics and/or Document First Name or Document Last Name in the Citizenship Status Detail page.
  - a. **Criteria:** At least one individual on the MAGI Request has a First or Last Name in either Individual Demographics and/or Document First Name or Document Last Name in the Citizenship Status Detail page containing any character that is not listed below:
    - i. Alphabetical letter (a-z, A-Z)
    - ii. Apostrophe (')
    - iii. Hyphen (-)
    - iv. Space ( )
2. Update Batch MAGI skip logic to skip a case for 'Middle Name does not start with a letter or contains invalid characters' (CT707\_IM) when at least one individual in the EDR has a Middle Name entered with invalid characters in Individual Demographics and/or Document Middle Name in the Citizenship Status Detail page.
  - a. **Criteria:** At least one individual on the MAGI Request has a Middle Name entered and the first character in either Individual Demographics and/or Document Middle Name in the Citizenship Status Detail page is not an alphabetical letter, or contains any character that is not listed below:
    - i. Alphabetical letter (a-z, A-Z)
    - ii. Apostrophe (')
    - iii. Hyphen (-)
    - iv. Space ( )

3. Update Batch MAGI skip logic to skip a case for 'Address Line 1 and/or Address Line 2 contains invalid characters' (CT707\_IS) when at least one individual in the EDR has an Address entered with invalid characters to add a period (.) as a valid character.
  - a. **Criteria:** At least one individual on the EDR has an address entered on Address Line 1 or Address Line 2 on the Contact Detail page and the address contains any character that is not listed below:
    - i. Alphabetical letter (a-z, A-Z)
    - ii. Numerical character (0-9)
    - iii. Comma (,)
    - iv. Forward slash (/)
    - v. Hyphen (-)
    - vi. Pound (#)
    - vii. Space ( )
    - viii. Period (.)

### 2.2.3 Execution Frequency

No Change

### 2.2.4 Key Scheduling Dependencies

No Change

### 2.2.5 Counties Impacted

All Counties

### 2.2.6 Category

No Changes

### 2.2.7 Data Volume/Performance

No Changes

### 2.2.8 Failure Procedure/Operational Instructions

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

## 2.3 eHIT

### 2.3.1 Overview

Update eHIT Outbound logic to strip any leading and trailing spaces on the Person Name fields in an EDR for both the 'Person Demographic Information' and the 'Document' sections and in the Disposition for the 'Primary Applicant Full Name' section.

### 2.3.2 Description of Change

1. Update eHIT Outbound logic to replace any 'tab' character or non-breaking space character (&nbsp;) with a space character, then strip any leading and trailing spaces on the Person Name fields in an EDR:
  - **personDemographicInformation**
    - personFullName
      - personGivenName
      - personMiddleName
      - personSurName
  - **document**
    - **documentPersonFullName**
      - personGivenName
      - personMiddleName
      - personSurName
2. Update eHIT outbound logic to replace any 'tab' character or non-breaking space character (&nbsp;) with a space character, then strip out any leading or trailing spaces and any character that is not an alphabetic letter for the below elements before sending a Disposition to CalHEERS:
  - **primaryApplicantFullName**
    - personGivenName
    - personMiddleName
    - personSurName

### 2.3.3 Interface Partner

CalHEERS

### 2.3.4 eHIT Schema Version

v19

## 2.4 One-time Batch MAGI

### 2.4.1 Overview

Create a one-time DCR to send an automated Renewal EDR for programs skipped in Batch MAGI due to either a Period (.) in the address or programs that erred out due to an extraneous space character in the name in the 'Batch MAGI Redetermination EDR' run for the September and October 2024 Renewal programs.

### 2.4.2 Description of Change

1. **October RE Programs:** Identify programs skipped from Batch MAGI for 'Address Line 1 and/or Address Line 2 contains invalid characters' (CT707\_IS) from the 8/1/2024 batch run for 'Batch Reason Code' = 'Batch MAGI Redetermination EDR' (CT2813\_01) and Benefit Month 09/2024.

Target the programs that triggered the skip where the RE Due Date is still 10/2024, and that have a period in Address Line 1 and/or Address Line 2 but do not have any non-allowable characters in Address Line 1 and/or Address Line 2.

Allowable Characters:

- ix. Alphabetical letter (a-z, A-Z)
- x. Numerical character (0-9)
- xi. Comma (,)
- xii. Forward slash (/)
- xiii. Hyphen (-)
- xiv. Pound (#)
- xv. Space ( )
- xvi. Period (.)

Exclude programs where a worker has sent a new EDR or run an Accepted and Saved a Regular EDBC for the Medi-Cal program on or after 08/02/2024.

This will capture the programs that were incorrectly skipped in the 8/1/2024 batch MAGI run because a period was considered non-allowable in the Address Line 1 or Address Line 2, but the address has no other non-allowable character.

For example:

- If a program was skipped because of a period in the Address Line 1, but has no other non-allowable characters, this program would be targeted.
- If a program was skipped because of a period in Address Line 1, but the program also has another non-allowable character in

Address Line 1 or Address Line 2, then this program would not be targeted.

2. **September RE Programs:** Identify programs skipped from Batch MAGI for 'Address Line 1 and/or Address Line 2 contains invalid characters' (CT707\_IS) from the 7/1/2024 batch run for 'Batch Reason Code' = 'Batch MAGI Redetermination EDR' (CT2813\_01) and Benefit Month 08/2024.

Target the programs that meet all the following criteria:

- a. The Medi-Cal program was skipped in Batch MAGI for 'IS' skip reason
- b. The Batch MAGI was initiated for EDR benefit month 08/2024 for Batch Reason Code '01'
- c. The Medi-Cal program RE Due Date is 09/2024
- d. There is a MAGI RE Packet (CT329\_MG) or Mixed Household RE Packet (CT329\_MI) with submit month = 09/2024 and latest packet status is either 'Generated', 'Error', or 'Sent'
- e. A worker has not sent a new EDR nor run an Accepted and Saved a Regular EDBC for the Medi-Cal program on or after 07/02/2024.
- f. There is a period in Address Line 1 and/or Address Line 2 and there are no non-allowable characters in Address Line 1 and/or Address Line 2

Allowable Characters:

- xvii. Alphabetical letter (a-z, A-Z)
- xviii. Numerical character (0-9)
- xix. Comma (,)
- xx. Forward slash (/)
- xxi. Hyphen (-)
- xxii. Pound (#)
- xxiii. Space ( )
- xxiv. Period (.)

This will capture the programs that were incorrectly skipped in the 7/1/2024 batch MAGI run because a period was considered non-allowable in the Address Line 1 or Address Line 2, but the address has no other non-allowable character.

3. **September and October RE Programs:** Insert the identified programs from Recommendations 2.4.2.1, and 2.4.2.2 into CH\_Transact with the following values:
  - TRANSACT\_CODE = 'ED'
  - EFF\_DATE = '01-SEPT-2024'
  - RUN\_RSN\_CODE = 'RE'
  - BATCH\_RSN\_CODE = '01'

### **2.4.3 Estimated Number of Records Impacted/Performance**

Estimated 20K programs to be processed.

## **2.5 Automated Regression Test**

### **2.5.1 Overview**

### **2.5.2 Description of Change**

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-280398

SF – CAAP GAGR COLA Change Effective  
10/01/2024 Batch EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/31/2024	1.0	Initial Draft	T. Lazio



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# 1 OVERVIEW

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Run Batch EDBC to apply new GA/GR Automated Solution program values for San Francisco County effective October 2024.

## 1.1 Current Design

SCR CA-280073 updated County Admin and Code Table values for the San Francisco GA/GR Automated Solution program for the fiscal year beginning October 2024.

## 1.2 Requests

San Francisco County is requesting the project run a COLA Batch EDBC to apply the new GA/GR Automated Solution program values effective October 1, 2024. This Batch EDBC will also include running the come-up month for CalFresh (CF) and Nutrition Benefit (NB) programs on the same case as the GA/GR program to apply the new unearned income amount in CF & NB calculations.

San Francisco County has also requested that exception listings and statistical report be provided as well as suppression of the grant increase Notice of Action (NOA).

## 1.3 Overview of Recommendations

1. Run Batch EDBC for the month of October 2024 through come-up month for active San Francisco County GA/GR Automated Solution programs which will include journal entries.
2. Run Batch EDBC for the come-up month for active CF & NB programs on the same case as a GA/GR program from Recommendation 1 above for come-up month only which will include journal entries.
3. Generate exception listings for the county to review, and a success report with statistics of records processed.

## 1.4 Assumptions

1. Existing batch logic in CalSAWS skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person.
2. Per existing exception logic, batch EDBC run on programs where the existing EDBC for the month is Read-Only will not be authorized.
3. Counties can check 'yellow banner' programs daily on the latest Qlik report.
4. SCR CA-280073 will update County Admin and Code Table values for the San Francisco GA/GR Automated Solution program.
5. There are no Grant increase NOAs in the system currently for San Francisco which are triggered through EDBC run and hence no DCR is required in this COLA run to not auto-generate any Grant increase NOAs.

## 2 RECOMMENDATIONS

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### 2.1 Run Batch EDBC for GA/GR and CF/NB

#### 2.1.1 Overview

Batch EDBC will run for the month of October 2024 through come-up month for active San Francisco County GA/GR Automated Solution programs, and for only the come-up month for CF and NB programs on the same case as the GA/GR program.

#### 2.1.2 Description of Changes

1. Run batch EDBC for active GA/GR Automated Solution programs in San Francisco County for all months from 10/2024 through come-up month (11/2024).
  - a. Exclude the following:
    - i. A regular GA/GR EDBC has already been processed for the benefit month(s) since SCR CA-280073 was applied in Production.
    - ii. The GA/GR program has a 'Yellow Banner' (i.e., the high-dated EDBC has a source of 'Conversion').
    - iii. The benefit month is past the latest RE Due date for the GA/GR program.
  - b. Batch EDBC records will have a run type code of 'Single Program'.
  - c. The Run Reason 'GA/GR COLA' will be used.
  - d. The Sub Type 'GA/GR COLA' will be used.
  - e. Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for [month, year].

Long Description: Batch EDBC Ran for <Effective Month>.  
Batch EDBC processed for the <Program Name> program  
for following reasons: GA/GR COLA
2. Run batch EDBC the come-up month (11/2024) on active CF and NB programs on the cases processed in Recommendation 1 above.
  - a. Exclude the following:
    - i. The CF or NB program has a 'Yellow Banner' (i.e., the high-dated EDBC has a source of 'Conversion').
    - ii. The benefit month is past the latest RE Due date for the CF program.
    - iii. The SAR7 report status for the CF program is 'Generated', 'Sent', 'Received', or 'Incomplete'.
  - b. Batch EDBC records will have a run type code of 'Targeted Program'.

- c. The Run Reason 'GA/GR COLA' will be used.
- d. The Sub Type 'GA/GR COLA' will be used.
- e. Batch EDBC will insert the following Journal entry:
  - Short Description: Batch EDBC ran for [month, year] .
  - Long Description: Batch EDBC Ran for <Effective Month> .
  - Batch EDBC processed for the <Program Name> program for following reasons: GA/GR COLA

### 2.1.3 Programs Impacted

GA/GR Automated Solution  
CF  
NB

## 3 REQUIREMENTS

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### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1163	The LRS shall be capable of handling several types of mass updates, including table changes and regulatory changes.	This SCR will run the Batch EDBC to update the COLA values for San Francisco County GA/GR Automated Solution Program.

## 4 OUTREACH

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### 4.1 COLA STATS Report

Generate a statistical report called 'COLA Stats Report' that summarizes the EDBC count for each program included in the COLA for SF County and contains the following fields:

- County
- GA/GR EDBC Counts
- GA/GR EDBC Processed
- GA/GR EDBC Skipped (Exception)
- GA/GR EDBC Read Only
- GA/GR EDBC Stack Trace
- GA/GR Success %
- CF EDBC Counts
- CF EDBC Processed
- CF EDBC Skipped
- CF EDBC Read Only
- CF EDBC Stack Trace
- CF Success Rate %
- **Total EDBC Count (GA/GR +CF)**
- **Total EDBC Processed**
- **Total EDBC Skipped (Exception)**
- **Total EDBC Read Only**
- **Total EDBC Stack Trace**
- **Overall Success Rate %**

**NOTE:** The columns in **bold** will include all programs in the COLA. Also, CF and NB counts will be consolidated under one set of counts designated as 'CF'.

### 4.2 Lists

Generate lists for the county to review after batch EDBC completes. All lists will have the following standard columns:

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

The following lists will be generated<sup>1</sup> with the standard columns shown above, plus any additional columns indicated:

1. **List Name:** List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".  
**Additional Column(s):** Program Type, Program Closure Reason
2. **List Name:** List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person".  
**Additional Column(s):** Program Type
3. **List Name:** List of cases where the GA/GR EDBC resulted in a benefit reduction. The case listing will be named "List of GA/GR Cases that Resulted in Benefit Reduction".  
**Additional Column(s):** Include columns to indicate each benefit reduction type in a separate column (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change)
4. **List Name:** List of cases that resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC".  
**Additional Column(s):** Program Type, Read-Only Reason
5. **List Name:** List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".  
**Additional Column(s):** Skip Reason, Program Type
6. **List Name:** List of any case with an authorized EDBC from the batch run. The case listing will be named "List of Cases Processed in Batch Run".  
**Additional Column(s):** Program Type
7. **List Name:** List of cases where a GA/GR member is receiving In-Kind income at any time during the batch months processed. The case listing will be named "List of Cases with In-Kind Income".

Income types to consider are:

**CODE\_NUM/NAME**

- 36-Utilities - Unearned
- 37-Utilities - Earned
- 92-Food - Unearned
- 93-Food - Earned
- 94-Clothing - Unearned
- 95-Clothing - Earned
- 96-Housing – Unearned
- 97-Housing - Earned

**Additional Column(s):** In-Kind Income Type

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<sup>1</sup> **Note:** If no data exists for a given list, that list will not be generated. **Example:** if no GA/GR EDBC results in a reduction in benefits, list #3 will not be generated.

Lists and COLA Stat Report will be posted to: CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2024 > CA-280398

## 5 APPENDIX

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### 5.1 Batch Operations:

- a) Run COLA batch sweep jobs to insert the selected GR programs into the SYS\_TRANSACT\_COLA table and insert the selected CF/NB programs into SYS\_TRANSACT\_COLA.
- b) After the previous step a) completes, execute the COLA batch job to run EDBC on all the SYS\_TRANSACT\_COLA records for the GR programs in step a) above.
- c) After EDBC processing from step b) completes, execute the COLA batch job to run EDBC on all the SYS\_TRANSACT\_COLA records for CF/NB programs in step a) above.

**Note:** Estimated Program Count for San Francisco County:

Program	Program Count
GR	5,090
CF	4,487
NB	3
<b>Estimated Total</b>	<b>9,580</b>