

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-252467

Modify the CalFresh, CalWORKs RE CalSAWS  
batch appointment logic

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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## 1.1 Current Design

Currently, Migration Counties can opt into either the Regular CalWORKs (CW)/CalFresh (CF) RE Appointment Scheduling batch job (PBXXC907) or the Flexible CW/CF RE Appointment Scheduling batch job (PBXXC908). LA has its own CW/CF RE Appointment Scheduling batch job (PB19C902 and PB19C909).

The majority of the monthly RE appointments scheduled by the batch jobs for Migration Counties are scheduled for the first few days of the month.

The batch jobs schedule RE appointments from the first business day of the RE Due Month until 2 business days before 10-day cut-off.

Customers who do not have a valid phone number are not scheduled for RE appointments.

The 'Outbound IVR Call' checkbox is not checked on the "Customer Appointment Detail" page when batch jobs schedule the appointment, although the recipient has opted into IVR notifications.

## 1.2 Requests

Modify the CW/CF RE Appointment Scheduling batch jobs to schedule appointments across multiple days. Additionally, for Migration Counties only, for CF only REs, start scheduling appointments from the day after the NOA 10-day cut-off in the month prior to the RE due month, provided there is worker availability. The batch jobs should schedule appointments up to and including the 10-day NOA cut-off every month. For counties that have opted to have customers initiate the call, bypass the valid phone number check. When a recipient has opted into IVR notifications, the batch jobs should check the 'Outbound IVR Call' checkbox when scheduling the appointment.

## 1.3 Overview of Recommendations

1. For Migration Counties, make the following modifications to the CW/CF RE Appointment Scheduling batch jobs:
  - a. Modify appointment scheduling so that appointments are scheduled across multiple days of availability.
  - b. For CF only REs, the batch jobs should begin scheduling appointments from the day after the NOA 10-day cut-off in the month prior to the RE Due Month, provided there is worker availability. The batch job should skip scheduling appointments for CF only REs if there is an existing

- appointment during this timeframe. (Note: CW only and CW/CF combo REs should continue to be scheduled during the RE Due Month only.)
- c. The batch jobs should schedule appointments up to and including the 10-day NOA cut-off every month.
  - d. For counties that have opted to have customers initiate the call, bypass the valid phone number check.
  - e. When a recipient has opted into IVR notifications, the batch jobs should check the 'Outbound IVR Call' checkbox when scheduling the appointment.

#### **1.4 Assumptions**

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. There are no changes to county opt-in/opt-out preferences.
3. The NOA 10-day cutoff is calculated as the first day of the benefit month minus 11 days. If that day is a Sunday or holiday, subtract an additional day.
4. For Migration Counties, appointments are only scheduled by the batch jobs if workers have Daily Threshold set up.
5. An appointment is determined to already exist if one has a status of 'Scheduled' or 'Rescheduled' and is one of the following appointment types:
  - a. 'Re-Evaluation CW/CF Interview'
  - b. 'RE Interview'
  - c. 'Telephone CW/CF RE Interview'
  - d. 'General Appointment – Telephone Interview Recertification'

## 2 RECOMMENDATIONS

### 2.1 Migration Counties – CW/CF RE Appointment Scheduling

#### 2.1.1 Overview

PBXXC907 and PBXXC908 schedule regular and flexible appointments for opted-in Migration Counties.

#### 2.1.2 Description of Change

1. Modify the CW/CF RE Appointment Scheduling batch jobs by distributing appointments throughout the RE appointment period. Schedule appointments on the first available time slot(s) for each day from the beginning of the RE appointment period until the end of the appointment period.

- a. Example 1: There are six 15 minute-long appointments to schedule, and the worker has availability set up between 8am and 8:45am, October 1<sup>st</sup> to October 4<sup>th</sup>. Assume a Daily Threshold of 4 and no overlapping appointments. Appointments would be scheduled by the batch jobs in the following manner, with the earliest time slots in the RE appointment period per day filled first:

	10/1	10/2	10/3	10/4
8am	Appointment 1	Appointment 2	Appointment 3	Appointment 4
8:15am	Appointment 5	Appointment 6		
8:30am				
8:45am				

- b. Example 2: There are 60 15-minute long appointments to schedule, and the worker has availability set up on 7 business days in the RE due month, from 8am to 12pm on each of those days. Assume a Daily Threshold of 10 and no overlapping appointments. The number of appointments scheduled per day would be distributed as follows:

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Number of Appointments Scheduled	9	9	9	9	8	8	8

2. Modify the time period in which the batch jobs will check for existing appointments and the time period in which the batch jobs will attempt to schedule appointments, depending on the program.

- a. For CF only REs, check for existing appointments beginning the business day after the NOA 10-day cutoff in the month prior to the RE Due Month, until the end of the RE Due Month. If no appointment exists, attempt to schedule appointments beginning the business day after the NOA 10-day cutoff in the month prior to the RE Due Month, until the NOA 10-day cutoff in the RE Due Month.
    - i. For example, assume that the NOA 10-day cutoff in September is September 20<sup>th</sup>, the NOA 10-day cutoff in October is October 21<sup>st</sup>, the 1<sup>st</sup> business day of October is October 1<sup>st</sup>, and the RE Due Month is October.
      1. If there is no existing appointment between September 21<sup>st</sup> and October 31<sup>st</sup>, the batch job will attempt to schedule the CF only RE due in October between September 21<sup>st</sup> and October 21<sup>st</sup>. If there is an existing appointment, the batch job should not attempt to schedule an additional appointment. Capture the reason why an appointment was not scheduled in the 'Redetermination – Final Exception Report' for reason 'Appointment already exists'.
  - b. For CW only REs and CW/CF combo REs, check for existing appointments beginning the first business day of the RE Due Month, until the end of the RE Due Month. If no appointment exists, attempt to schedule appointments beginning the first business day of the RE Due Month, until the NOA 10-day cutoff in the RE Due Month.
    - i. For example, assume that the NOA 10-day cutoff in October is October 21<sup>st</sup>, the 1<sup>st</sup> business day of October is October 1<sup>st</sup>, and the RE Due Month is October.
      1. If there is no existing appointment between October 1<sup>st</sup> and October 31<sup>st</sup>, the batch job will attempt to schedule the CW only RE or the CW/CF combo RE due in October between October 1<sup>st</sup> and October 21<sup>st</sup>. If there is an existing appointment, the batch job should not attempt to schedule an additional appointment. Capture the reason why an appointment was not scheduled in the 'Redetermination – Final Exception Report' for reason 'Appointment already exists'.
3. For counties that have opted to have customers initiate the call, bypass the valid phone number check.
  4. For the customer that an appointment has been successfully scheduled, check whether the valid phone number has opted into IVR notifications on the Contact Detail page. For counties that have opted to have customers initiate the call, check whether the customer has any phone number opted into IVR notifications. If the customer has opted into IVR notifications, the batch job should add the customer as

the Outbound IVR call recipient and the 'Outbound IVR Call' checkbox should be checked for the appointment.

- i. Note: The 'Outbound IVR Call' checkbox is only available on the Customer Appointment Detail page if a customer has opted into IVR notifications.

### **2.1.3 Execution Frequency**

No change.

### **2.1.4 Key Scheduling Dependencies**

No change.

### **2.1.5 Counties Impacted**

PBXXC907 – Alameda, El Dorado, Humboldt, Kings, Mono, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, Santa Cruz, Shasta

PBXXC908 – Contra Costa, Fresno, Kern, Merced, Nevada, Riverside, San Mateo, Solano, Sonoma, Stanislaus, Tehama, Tulare, Yuba

### **2.1.6 Category**

No change.

### **2.1.7 Data Volume/Performance**

N/A

### **2.1.8 Failure Procedure/Operational Instructions**

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



### 3 SUPPORTING DOCUMENTS

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

Number	Functional Area	Description	Attachment

## 4 REQUIREMENTS

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[Document what requirements are being addressed with this design and how they are being met]

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met