



[CA-252467] Modify the CalFresh, CalWORKs RE CalSAWS batch appointment logic

Issue Type:	SCR	Team Responsible:	Batch/Interfaces	Assignee:	Unassigned
Fix Version/s:	[25.01]	Designer Contact:	Shining Liu	Change Type (SCR):	Policy Re-Design
Minor Version:		Expedite Changes:	No	Estimate:	275
Reporter:	Dymas Pena	Regulation Reference:	ACL 21-24, ACL 21-24E	Created:	11/07/2022 06:17 PM
Status:	Design in Progress	Impact Analysis:	[Business Process]	Outreach Required:	
Policy/Design Consortium Contact:	Norma Meza	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	County Action:	[No County Action Needed]	Funding Source ID:	
Other Agency Cross Reference:					

Current Design:

Currently, migration counties can opt into either the regular or flexible CWCF RE Appointment scheduling batch job. LA has its own CWCF RE Appointment scheduling batch job.

RE appointment scheduling batch job books appointments across multiple days instead of one day at a time. This causes the majority of the monthly RE appointments to be scheduled for the first few days of the month.

Example: Below are the OCT-21 scheduled Appts. (total 49,116 appointments) the first few business days of the month.

DATE FRI
1-Oct MON
4-Oct TUES5-Oct WEDS6-Oct THUR7-Oct FRI
8-Oct MON
11-Oct TUES12-Oct WED
13-Oct THUR14-Oct
Appts. 21,029 14,867 7,465 2,751 1,158 722 3 529 381 211

Although there are appointments scheduled across the entire month, the biggest variance always occurs on the first few business days of the month.

The batch job begins scheduling appointments on the first of the RE Due Month. Batch uses 10-day NOA cutoff logic, and then goes back an additional 2 business days to find the final day of the RE month for which appointments will be scheduled. Example: December RE Due Month – 10-day NOA cutoff is 12/21/2023, and 2 business days prior is 12/19/2023. Batch will schedule appointments from 12/1/2023 – 12/19/2023.

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

When a recipient has opted into IVR notification, the batch is not checking the 'Outbound IVR Call' checkbox on the "Customer Appointment Detail" page.

Request:

1. Modify the appointment scheduling across multiple days, this change will allow appointments to be more equally distributed allowing line staff to better handle the volume across multiple days.
2. Migration counties: For CF Only REs, have the batch begin scheduling appointments for the day after NOA 10-day in the month prior to the RE Due Month, provided worker availability is entered for this timeframe. The batch should also skip scheduling an appointment for any case that has an appointment during this timeframe. (NOTE: CW and CWCF REs should continue to be scheduled in the RE Due Month).
3. Migration Counties: Have the batches schedule appointments through 10-day NOA cutoff. Example: December RE Due Month – 10-day NOA cutoff is 12/21/2023. Batch will schedule appointments from 12/1/2023 – 12/21/2023.
4. Migration Counties: Bypass the valid phone number requirement for counties that opted to have the customers call them for the RE phone interview ('inbound' phone appointments).

5. Migration Counties: When a recipient has opted in to IVR notification, the batch should check the 'Outbound IVR Call' checkbox when scheduling the appointment.

Recommendation:

Batch should fill appointment slots across days instead of one day at a time. Example: Schedule 8am appointments then repeat the process with 8:15am and then 8:30 and so on. This will allow appointments to be spread evenly based on the existing days identified in the the batch- job logic. The goal is to have a better way of load balancing the work in a more manageable form.

Example: Below are the OCT-21 scheduled Appts. (total 49,116 appointments) after the change the total number of daily appointments will be around the same amount across many days.

DATE 1-Oct 4-Oct 5-Oct 6-Oct 7-Oct 8-Oct 11-Oct 12-Oct 13-Oct 14-Oct
Appts. 4,911 4,911 4,911 4,911 4,911 4,911 4,911 4,911 4,911 4,911

Outreach

Description:

Operational Impact:

Release Note

Yes

Required:

Release Note Status:

Release Note -

Previous Design/

Problem:

Migration counties could opt into either the regular or flexible CWCF RE Appointment Scheduling batch job. LA has its own CWCF RE Appointment Scheduling batch job.

CWCF RE Appointment Scheduling batch jobs booked appointments across multiple days instead of one day at a time. This caused the majority of the monthly CWCF RE appointments to be scheduled for the first few days of the month. Although there were appointments scheduled across the entire month, the biggest variance always occurred on the first few business days of the month.

The CWCF RE Appointment Scheduling batch jobs began scheduling appointments on the first of the RE Due Month. The batches used 10-day NOA cutoff logic, and then went back an additional 2 business days to find the final day of the RE month for which appointments will be scheduled.

Customers who did not have a valid phone number were not scheduled for RE appointments.

When a recipient opted into IVR notification, the batches were not checking the 'Outbound IVR Call' checkbox on the "Customer Appointment Detail" page.

Release Note - Now:

The CWCF RE Appointment Scheduling Batches will fill appointment slots across days instead of one day at a time. This will allow appointments to be spread evenly based on the existing days identified in the batch- job logic.

For Migration Counties: For CF Only REs, the CWCF RE Appointment Scheduling batches will begin scheduling appointments for the day after NOA 10-day in the month prior to the RE Due Month, provided worker availability is entered for this timeframe. The batch will also skip scheduling an appointment for any case that has an appointment during this timeframe. (NOTE: CW and CWCF REs will continue to be scheduled in the RE Due Month). In addition, the CWCF RE Appointment Scheduling batches will schedule appointments through 10-day NOA cutoff. The batches will also bypass the valid phone number requirement for counties that opted to have the customers call them for the RE phone interview ('inbound' phone appointments). In addition, when a recipient has opted in to IVR notification, the CWCF RE Appointment Scheduling batches will check the 'Outbound IVR Call' checkbox when scheduling the appointment.

Release Note

- Additional

Information:

Release Note -

Functional Area:

Release Note - Page/

Forms/Reports

Impacted: