CalSAWS

California Statewide Automated Welfare System

Design Document

CA-55990

Track EDBC Authorizations and Rejections

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/28/2020	1.0	Initial Draft	T. Lazio
9/18/2024	2.0	Content Revision: - Removed Assumption regarding SCR CA-203750 - Updated Section 2.3 Daily GR Time Limit Batch Job to apply to all Counties that have GR Time Limit job turned on. Removed job name,	T. Lazio S. Garg

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1 OVERVIEW

The CalSAWS 'Pending Authorization' logic requires that EDBCs meeting certain criteria must be authorized by a 1st Level Approver (referred to as 'Supervisor' in Los Angeles County) and/or 2nd Level Approver (referred to as 'Deputy' in Los Angeles County) in addition to the Eligibility Worker (EW). The purpose of this SCR is to store and track the final EDBC authorization date in order to accurately process cases based on that final EDBC authorization date.

1.1 Current Design

In CalSAWS, an EDBC authorization is a multi-step process that requires one of the following:

1. EW authorization only.
2. EW and 1st Level Approver authorization.
3. EW, 1st Level Approver, and 2nd Level Approver authorization.

The initial authorization is tracked by the EDBC 'Run Date' which displays the date the eligibility worker accepted and saved the EDBC. The majority of processed authorizations only require EW authorization. However, if the system determines that a 1st Level or 2nd Level Approver authorization is needed, the system does not track the dates of the subsequent authorizations by a 1st Level Approver and/or 2nd Level Approver.

1.2 Requests

1. Create a new table with an 'Authorization Date' field to store and track EDBC authorizations and rejections.
2. Modify EDBC logic to populate a new record in the database table when the following actions occur:
    a. 'Save and Continue' – When a user chooses to accept EDBC results and then selects 'Save and Continue', the EDBC Run Status will either be set to 'Accepted – Saved' if no additional approval is needed, or 'Pending Authorization' if 1st Level or 2nd Level approval is required.
    b. 'Authorize' – When a 1st Level Approver or 2nd Level Approver chooses to authorize an EDBC with a Run Status of 'Pending Authorization'.
    c. 'Reject' - When a 1st Level Approver or 2nd Level Approver chooses to reject an EDBC with a Run Status of 'Pending Authorization'.
3. If the final authorization occurs after the EDBC Run Date, the GR Time Clock will never be established. Therefore, update the Daily GR Timeclock Batch Job to use the latest 'Authorization Date' for EDBCs with a status of 'Accepted-Saved'.

1.3 Overview of Recommendations

1. Create a new database table to track EDBC authorizations and rejections.

2. Update EDBC authorization logic to insert a new record into the new database table whenever an EDBC is accepted and saved, authorized, or rejected.
3. Modify Daily GR Time Limit batch job (PB19F308) to use the new 'Authorization Date'.

1.4 Assumptions

1. 1st Level and 2nd Level Authorization types have been configured for the county.
2. Existing authorization task generation will remain unchanged.
3. EDBCs with a status of 'Accepted-Saved' or 'Rejected' prior to the implementation of this SCR will not have a record added to this new table.
4. EDBCs with a status of 'Pending Authorization' prior to the implementation of this SCR will have a record added to this new table when the EDBC is authorized or rejected after this SCR is implemented.
5. Existing criteria for the Daily GR Time Limit batch job (PB19F308) other than the update specified in this SCR will remain unchanged.

2 RECOMMENDATIONS

2.1 Create New Database Table for EDBC Authorizations

2.1.1 Overview

A new database table will be created to store and track EDBC authorizations and rejections. Records will be written to this table after the eligibility determination is complete and the user chooses to authorize or reject an EDBC.

2.1.2 Description of Changes

1. Create a new database table that will store and track EDBC authorizations and rejections. The following attributes will be part of this table:

    a. Authorized By – Staff ID of the person who authorized or rejected an EDBC.

    b. Authorization Date– Date that the EDBC was authorized or rejected.

    c. EDBC ID – Unique identifier of the EDBC that was authorized or rejected.

    d. EDBC Run Status – Run status of the EDBC after the user has acted on it. NOTE: The Run status will either be 'Accepted -

Saved', 'Pending Authorization' or 'Rejected' which are values from Code Table 274 EDBC Run Status Code.

2.2 Update EDBC Authorization Logic

2.2.1 Overview

EDBC authorization logic will be updated to insert a record into the new database table whenever an EDBC is authorized or rejected. Batch EDBC, Online EDBC, Negative Action and Manual EDBC will insert records into the new table after eligibility determination is complete and the EDBC is authorized or rejected.

The EDBC authorization can be a one or multiple step process that requires one of the following:

1. EW authorization only.
2. EW and 1st Level Approver authorization.
3. EW, 1st Level Approver, and 2nd Level Approver authorization.

The majority of processed authorizations only require EW authorization. However, EDBCs for certain programs such as Homeless Assistance-Permanent can require 1st Level Approver and 2nd Level Approver authorization.

The EDBC authorization process can include the following user actions:

i. 'Save and Continue' – When an EW chooses to accept an EDBC result and selects 'Save and Continue', the EDBC Run Status will either be set to 'Accepted – Saved' if no other authorization is needed, or 'Pending Authorization' if 1st Level Authorization and/or 2nd Level Authorization is required.

ii. 'Authorize' – When a 1st Level Approver or 2nd Level Approver chooses to authorize an EDBC with a Run Status of 'Pending Authorization' which will either set the EDBC Run Status to 'Accepted – Saved' or 'Pending Authorization' if 2nd Level Authorization is required.

iii. 'Reject' - When a 1st Level Approver or 2nd Level Approver chooses to reject an EDBC with a Run Status of 'Pending Authorization' which will set the EDBC Run Status to 'Rejected'.

The following scenarios show how multiple levels of authorization would work with the new logic. The 'Authorization Date' of the inserted record will always be set to the date and time of the user action.

Scenario 1: EW authorization only.

Initial Authorization: EW clicks 'Save and Continue' to accept the EDBC and the Run Status shows 'Accepted – Saved' indicating final authorization. Under the new logic, one record would be inserted into the new database table with the 'EDBC Run Status' set to 'Accepted-Saved'.

Scenario 2: EW authorization with 1st Level Approver acceptance.

Initial Authorization: EW clicks 'Save and Continue' to accept the EDBC and the Run Status shows 'Pending Authorization' requiring 1st Level approval. Under the new logic, the 1st record would be inserted into the new database table with the 'EDBC Run Status' set to 'Pending Authorization'.

1st Level Authorization: 1st Level Approver accesses the EDBC and clicks 'Authorize' to accept the EDBC and the Run Status shows 'Accepted – Saved' indicating final authorization. Under the new logic, the 2nd record would be inserted into the new database table with the 'EDBC Run Status' set to 'Accepted-Saved'.

Scenario 3: EW authorization with 1st Level Approver and 2nd Level Approver acceptance.

Initial Authorization: EW clicks 'Save and Continue' to accept the EDBC and the Run Status shows 'Pending Authorization' requiring 1st Level approval. Under the new logic, the 1st record would be inserted into the new database table with the 'EDBC Run Status' set to 'Pending Authorization'.

1st Level Authorization: 1st Level Approver accesses the EDBC and clicks 'Authorize' to accept the EDBC and the Run Status shows 'Pending Authorization' requiring 2nd Level approval. Under the new logic, the 2nd record would be inserted into the new database table with the 'EDBC Run Status' set to 'Pending Authorization'.

2nd Level Authorization: 2nd Level Approver accesses the EDBC and clicks 'Authorize' to accept the EDBC and the Run Status shows 'Accepted - Saved' indicating final authorization. Under the new logic, the 3rd record would be inserted into the new database table with the 'EDBC Run Status' set to 'Accepted-Saved'.

Scenario 4: EW authorization with 1st Level Approver rejection.

Initial Authorization: EW clicks 'Save and Continue' to accept the EDBC and the Run Status shows 'Pending Authorization' requiring 1st Level approval. Under the new logic, the 1st record would be

inserted into the new database table with the 'EDBC Run Status' set to 'Pending Authorization'.

1st Level Authorization: 1st Level Approver accesses the EDBC and clicks 'Reject' to reject the EDBC and the Run Status shows 'Rejected'. Under the new logic, the 2nd record would be inserted into the new database table with the 'EDBC Run Status' set to 'Rejected'.

Scenario 5: EW authorization with 1st Level Approver acceptance and 2nd Level Approver rejection.

Initial Authorization: EW clicks 'Save and Continue' to accept the EDBC and the Run Status shows 'Pending Authorization' requiring 1st Level approval. Under the new logic, the 1st record would be inserted into the new database table with the 'EDBC Run Status' set to 'Pending Authorization'.

1st Level Authorization: 1st Level Approver accesses the EDBC and clicks 'Authorize' to accept the EDBC and the Run Status shows 'Pending Authorization' requiring 2nd Level approval. Under the new logic, the 2nd record would be inserted into the new database table with the 'EDBC Run Status' set to 'Pending Authorization'.

2nd Level Authorization: 2nd Level Approver accesses the EDBC and clicks 'Reject' to reject the EDBC and the Run Status shows 'Rejected'. Under the new logic, the 3rd record would be inserted into the new database table with the 'EDBC Run Status' set to 'Rejected'.

2.2.2 Description of Changes

1. Update EDBC logic to insert record into the new database table during EDBC authorization. The new record will capture the following data elements:
    a. Authorization Date
    b. Authorized By (i.e. Staff ID of the user who authorized or rejected the EDBC)
    c. EDBC ID
    d. EDBC Run Status which matches the Run Status of the EDBC after the user has acted on it, and can be one of the following:
        i. Pending Authorization
        ii. Accepted – Saved
        iii. Rejected

Note: Since the new database table will be a child table to EDBC, it will be subject to the EDBC cascade delete functionality. If an EDBC is reprocessed for a case, any temporary EDBC data that has not been fully

authorized or rejected (i.e. EDBC Run Status is not 'Accepted - Saved' or 'Rejected') will be deleted before the new EDBC is calculated.

2.2.3 Programs Impacted

All EDBC Programs

2.2.4 Performance Impacts

None

2.3 Update Daily GR Time Limit Batch Job

2.3.1 Overview

The Daily GR Timeclock Time Limit Batch Job currently processes cases based on the initial EDBC Run Date, which does not always reflect when the case is authorized. This update is to allow the Daily GR Timeclock Time Limit Batch Job to use the 'Authorization Date' field in the new database table, which will more accurately reflect when the case was authorized.

2.3.2 Description of Change

Modify the driving query for the batch to identify 'Accepted-Saved' EDBCs for processing based on the following criteria:

- The most recent 'Authorization Date' for the EDBC in the new database table is between the Last Success Date and Batch Date.

- If the record does not exist in the new table, continue to use current logic to check if EDBC Run Date on EDBC table is between the Last Success Date and Batch Date.

2.3.3 Execution Frequency

No Change.

2.3.4 Key Scheduling Dependencies

No Change.

2.3.5 Counties Impacted

All Counties that have time limits functionality turned on in CalSAWS.

2.3.6 Data Volume/Performance

No Change.

2.3.7 Failure Procedure/Operational Instructions

No Change.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.9.1.4	The LRS shall record the authorization and disposition of a case/program.	This SCR will allow LRS to record and store the final EDBC authorization.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232192

Deprecate CalSAWS Core Password Functionalities

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Trevor Torres
	Reviewed By	Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/8/2023	1.0	Initial Revision	Trevor Torres
9/17/2024	1.1	Section 2.3 (Automated Regression Test) added. Updated Section 1.2 Request.	William Baretsky Trevor Torres

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1 OVERVIEW

Currently, former C-IV counties are able to reset their password through the Security Assignment page by clicking the reset button. The current Password Reset functionality for former C-IV Counties does not coincide with what all CalSAWS Users must use, which the ForgeRock password reset functionality to successfully login into CalSAWS Core. This SCR will be removing the current password functionality and associated functions for former C-IV counites.

1.1 Current Design

Currently, former C-IV counties are able to reset their password through the Security Assignment page by clicking the reset button, which C-IV county users should not be able to do.

There is also a message that displays on the CalSAWS homepage stating that their password is expired, along with user's receiving an email that is sent from CalSAWS about the expired password.

1.2 Requests

1. Remove the functionality to reset password from CalSAWS, this will include any link within CalSAWS that will allow them to reset password directly through the CalSAWS application.
2. Remove the message from the CalSAWS homepage that displays the countdown on password being expired ~~along with the email that is sent out to let users know about their password is being expired.~~
3. ~~Update CalSAWS to no longer send out an email with the message that their CalSAWS password will expire in 'x' amount of days~~.
4. Update the Security Assignment page to have users in former C-IV counties go through the current process as former CalWIN.

1.3 Overview of Recommendations

1. Remove the "Change Password" button on the CalSAWS Homepage.
2. Remove the "Reset Password" button and "Password" field on the Security Assignment Detail page within CalSAWS.
3. Remove the message from the CalSAWS homepage that display the countdown on password being expired.
4. Update the Security Assignment page to have users in former C-IV counties go to the CalSAWS Identity Search page when using the "Add User Name" button.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.
2. New staff that needs access to CalSAWS will need to be added to ForgeRock by ForgeRock Delegated Admin prior to adding them into CalSAWS.

3. New staff will receive their e-mail address as their CalSAWS User Name.
4. Existing CalSAWS users with a login will not have their current "User Name" impacted by the changes made with this SCR.
5. The changes made with this SCR will no longer send out the email with the message that their CalSAWS password will expire in 'x' amount of days.

2 RECOMMENDATIONS

2.1 Homepage

2.1.1 Overview

The Homepage is the landing page that users are navigated to when logging into the system. This SCR will remove the "Change Password" button within CalSAWS and the message for expired passwords.

2.1.2 Description of Changes

1. Remove the "Change Password" button from the CalSAWS Homepage for former C-IV counties, which will align with the process of other counties.
2. Remove the message from the CalSAWS homepage that display the countdown on password being expired for former C-IV counties, which will align with the process of other counties.

2.1.3 Security Updates

N/A

2.1.4 Page Mapping

N/A

2.1.5 Page Usage/Data Volume Impacts

N/A

2.1.6 Accessibility

The following Accessibility enhancements have been identified:

- Elements must only use supported ARIA attributes.
- Frames must have an accessible name.

2.2 Security Assignment

2.2.1 Overview

The Security Assignment page is used for displaying Staff Name, User Name, Login Status, Assigned Security Roles, Assigned Security Groups and more if applicable. The page is also used for generating User Names for newly created staff, as well as resetting the temporary password that is created with the User Name. This SCR will remove the "Reset Password" button and "Password" field within CalSAWS.

2.2.2 Security Assignments Mockups

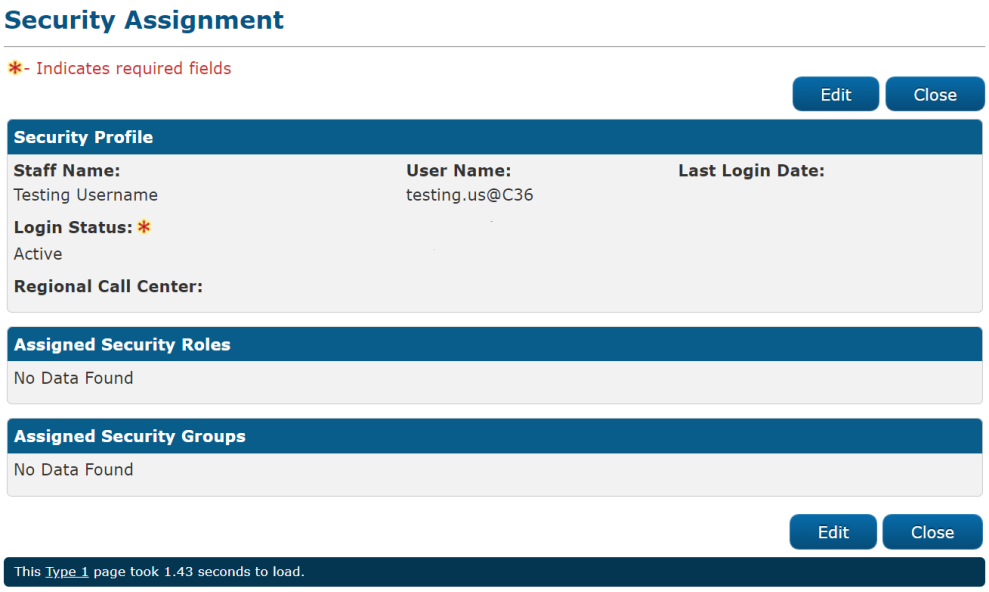

Figure 2.2.2.1 – Security Assignment No Reset Password Mockup

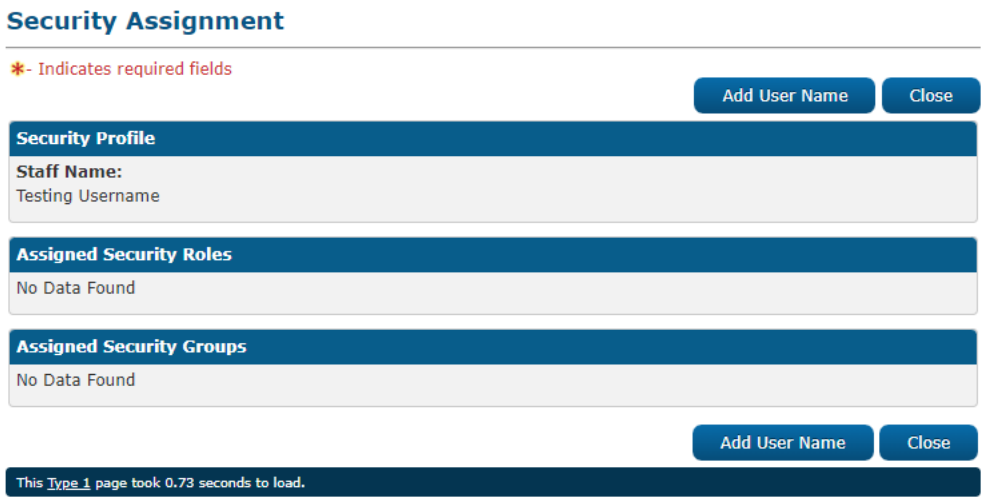

Figure 2.2.2.2 – Security Assignment "Add User Name" button

2.2.3 Description of Changes

1. Remove the "Reset Password" button and "Password" field on the Security Assignment Detail page within CalSAWS for former C-IV counties.
2. Update the existing logic used on the "Add User Name" button to take users in former C-IV counties to the "CalSAWS Identity Search" page.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.2.8 Accessibility

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

2.3 Automated Regression Test

2.3.1 Overview

Update the existing script(s) targeting the 'Add User Name' button navigation to the 'CalSAWS Identity Search' page to support the former C-IV Counties in addition to the former CalWIN counties.

2.3.2 Description of Changes

1. Update the 'Security Assignment - CalSAWS Identity Search' script to support all 57 Migration counties (all except Los Angeles County).

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.1.1.29	The LRS shall include the ability to system-generate the password for the User, whereby the generation, transmission, and internal storage of the password is accomplished in a secure manner based on industry standards.	This SCR is removing the buttons that reset passwords with generation, transmission, and internal storage in a secured manner based on industry standards.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-239033

Hide Fields in Document Views

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez, Rhiannon Chin

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
07/25/2024	1.0	Initial draft	Robyn Anderson
9/19/2024	1.1	Updated fields to remove	Imaging Team

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1 OVERVIEW

1.1 Current Design

When a user is searching for a document in the Hyland Imaging system, they are given a drop-down menu of fields to use as search criteria. However, that menu contains all fields possible in the Imaging system, including system fields that are hidden from the user everywhere else. This makes the list much longer than it should be and it can be difficult for the user to find the field they wish to use.

1.2 Requests

- Hide system fields in the drop down that workers do not use to specify their search criteria. Hide duplicate/similar named fields and any other fields the users are not normally exposed to.

1.3 Overview of Recommendations

1. Configure the drop-down menu on the search pages so that system fields and duplicate/similarly named fields are not visible to the user.

1.4 Assumptions

1. This is a configurable option and Hyland will not have to make any code changes to make this happen.

2 RECOMMENDATIONS

2.1 Hide fields in document views.

2.1.1 Overview

Currently, all fields that exist in the system, including ones not normally seen by end users, are present in the Hyland search pages. Hide system fields and duplicate/similarly named fields to reduce user confusion and make it easier to find the correct fields for a search.

2.1.2 Description of Change

Configure the drop-down menu on the Imaging system Document search pages to hide the following fields:

- Check out comments
- Checked out
- Checked out by
- Current Version
- Digital signature status
- Has hold applied
- Has physical file reference
- Has shortcut
- Hold name
- Is checked out
- Is in workflow
- Is private
- Is version controlled
- Next Task due
- Pending approval by
- Private by
- Summary task count (active)
- Summary task count (inactive)
- Summary task Status
- Workflow item ID
- Workflow Status
- Workflow queue
- Workflow user
- Batch Capture – Document
- Batch Capture – Documents
- Batch Capture – Origin
- Case Number (Duplicate field)
- Created (Duplicate field)
- Created By (duplicate field)

- Deleted By
- Document Copies
- Invalid Reason
- DOB
- SSN

Configure the drop-down menu on the Imaging system Capture and Indexing search pages to hide the following fields:

- Folder creation date
- Folder creation date range
- Folder status
- Folder type
- Has required documents
- State start time
- State start time range
- Workflow Item ID
- Workflow item type
- Workflow item user
- Batch Capture – Document
- Batch Capture – Documents
- Batch Capture – Origin
- Drawer
- Case/Person UID
- Case Number/CIN
- Case/Person Name
- Barcode
- Form Number
- Form Name
- Applicable Date
- Barcode Override
- Batch Capture - Document
- Batch Capture - Documents
- Batch Capture - Origin
- Capture Information
- Confidential
- County Code
- Deleted By
- DOB
- Document Copies
- Document Scope
- Document Type
- E-Application Number
- Hearings Number
- Invalid Reason
- Investigations ID

- Legacy Creation Date
- Legacy Image ID
- Legacy Index
- No Change SAR7/QR7
- OCR Batch
- OCRBypass
- OCRSplitOverride
- Origin
- Person Override
- Processing Queue
- Program List
- Program UID
- Receipt Number
- Received Date
- Returned Mail Indicator
- SSN
- Task Override
- Time Sensitive

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242103

Update PUB 388 to Current Version in Template Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Alekhya Nagalingam
	Reviewed By	Nagesha S, P Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/20/2024	1.0	Initial Draft	Alekhya Nagalingam
08/22/2024	1.1	1. Add central printing capability with CalSAWS standard header to the PUB 388 form. 2. PUB 388 will be associated to CalFresh, CalWORKs, Welfare to Work, RCA, Cal-Learn and REP programs. 3. Updating the mailing address and document parameter page to select the case number, associated programs, participant name and languages.	Nagesha S

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2.2.3 Form Variable Population 7

2.2.4 Form Generation Conditions 7

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1 OVERVIEW

The purpose of this change is to update PUB 388 to Current Version (2/24) and add new additional languages in CalSAWS Template Repository.

1.1 Current Design

Currently the PUB 388 (8/17)- California Electronic Benefit Transfer (EBT) Card Publication is available in the template repository in English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

1.2 Requests

1. Update the PUB 388 to Current Version (2/24) in Template Repository.
   Languages Include: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

2. Add PUB 388 (2/24) in threshold languages in Template Repository.
   Languages Include: Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian.

3. Add central printing capability with CalSAWS Standard header to the PUB 388 form.
   Languages Include: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog, Vietnamese, Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian.

1.3 Overview of Recommendations

1. Update the PUB 388 to Current Version (2/24) in Template Repository.
   Languages Include: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

2. Add PUB 388 (2/24) in threshold languages in Template Repository.
   Languages Include: Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian.

3. Add central printing capability with CalSAWS Standard header to the PUB 388 form.
   Languages Include: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog, Vietnamese, Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian.

4. PUB 388 form will be associated to CalFresh, CalWORKs, Welfare to Work, RCA, Cal-Learn and REP programs.

1.4 Assumptions

1. There is no variable population with this effort. (aside from the standard header and footer information).
2. All fields (blank or prepopulated) will be editable.
3. Supporting Documents section references attachments found on Jira.
4. PUB 388 will updated in the RE Packets with SCR CA-271153.

2 RECOMMENDATIONS

2.1 Update the PUB 388 to Current version (2/24) in English and threshold languages.

2.1.1 Overview

This effort will update the PUB 388 to Current Version (2/24)) in English and threshold languages.

State Form: PUB 388 (2/24)
Programs: CalFresh, CalWORKs, Welfare to Work, RCA, Cal-Learn and REP
Attached Forms: N/A
Form Number: PUB 388
Forms Category: Forms
Template Repository Visibility: All Counties
Form Title (Document List Page Displayed Name): California Electronic Benefit Transfer (EBT) Card
Template Description: California Electronic Benefit Transfer (EBT) Card
Existing Languages: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

2.1.2 Form Verbiage

Update PUB 388 XDP

Existing PUB 388 xdps will be updated for the PUB 388 (2/24) in English and threshold languages.

Threshold Languages: English**,** Spanish Armenian, Cambodian, Arabic, Chinese*, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.
*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese and Mandarin

Form Header: CalSAWS Standard Header (HEADER_1_EN)
Include NA Back 9: No
Imaging Form Name: CA EBT CARD PUBLICATION
Imaging Document Type: Electronic Benefit Transfer (EBT)

Imaging Case/Person: Case
Form Mockups/Examples: See supporting document #1

2.1.3 Form Variable Population

N/A

2.1.4 Form Generation Conditions

The PUB 388 (2/24) can be generated via Template Repository.

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

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Form Print Options and Mailing Requirements

The following are the print and mailing requirements for PUB 388 (2/24)

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

Mailing Options:

Mailing Options	Option for PUB 388
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for PUB 388 Form
Post to Self-Service Portal	Y

2.2 Add PUB 388 (2/24) in threshold languages.

2.2.1 Overview

This effort will add additional languages to the PUB 388 (2/24) in all threshold languages.

State Form: PUB 388 (2/24)
Programs: CalFresh, CalWORKs, Welfare to Work, RCA, Cal-Learn and REP
Attached Forms: N/A
Form Number: PUB 388
Forms Category: Forms
Template Repository Visibility: All Counties
Form Title (Document List Page Displayed Name): California Electronic Benefit Transfer (EBT) Card
Template Description: California Electronic Benefit Transfer (EBT) Card
Languages: Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian

2.2.2 Form Verbiage

Create PUB 388 XDP
New XDP will be created for PUB 388 (2/24) in threshold languages.
Threshold Languages: Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian.

Form Header: CalSAWS Standard Header (HEADER_1_EN)
Include NA Back 9: No
Imaging Form Name: CA EBT CARD PUBLICATION
Imaging Document Type: Electronic Benefit Transfer (EBT)
Imaging Case/Person: Case
Form Mockups/Examples: See supporting document #2

2.2.3 Form Variable Population

Field Mappings: Use the same field mappings as the English Form for population logic.

2.2.4 Form Generation Conditions

Add PUB 388 (2/24) to Template Repository

PUB 388 (2/24) can be generated via Template Repository in Hindi, Mien, Japanese, Punjabi, Thai and Ukrainian languages.

Add Form Control

Add an imaging barcode for PUB 388.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Add Form Print Options and Mailing Requirements

The following are the print and mailing requirements for PUB 388 (2/24)

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

Mailing Options:

Mailing Options	Option for PUB 388
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for PUB 388 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	PUB 388 (2/24)	PUB 388_EN.pdf PUB 388_SP.pdf PUB 388_AE.pdf PUB 388_AR.pdf PUB 388_CA.pdf PUB 388_CH.pdf PUB 388_FA.pdf PUB 388_KO.pdf PUB 388_HM.pdf

			PUB 388_LA.pdf PUB 388_RU.pdf PUB 388_TG.pdf PUB 388_VI.pdf
2	Forms	PUB 388 (2/24)	PUB 388_HI.pdf PUB 388_MI.pdf PUB 388_JA.pdf PUB 388_PU.pdf PUB 388_TH.pdf PUB 388_UK.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers and flyers, including: a. Appointment notices; b. Redetermination, Recertification and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices;	• PUB 388 is being updated with latest version for the existing languages and added in additional 6 new languages. • PUB 388 is being updated with central printing capability with CalSAWS Standard header.

	s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-251475

Modify the CalSAWS Pending Unassigned Employment Services Program List

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu, Gerald Limbrick
	Reviewed By	Michael Wu, Aaron Fowler, William Baretsky

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/14/2023	1.0	Initial Draft	Gabriellia Venegas-Johnson, Shining Liu, Gerald Limbrick
3/20/2024	1.1	2ND Draft with Mockups	Shining Liu, Gerald Limbrick
4/2/2024	1.2	Removed sort capability from new panel. Updated logic so that edits are not saved until the user presses the 'Save' button	Gerald Limbrick, Shining Liu
9/10/2024	1.3	Content Revision – Updated batch job with details on when office mapping cannot be found, updated default office mapping supporting document	Shining Liu

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1 OVERVIEW

This SCR will update the Pending Unassigned Employment Services Program List to automatically assign Welfare-to-Work (WTW) cases to designated GAIN Regional Offices' Unassigned Pool based on zip code.

1.1 Current Design

During 2021, due to the office closure of former LA County Cudahy district #06 and the conversion of former Southwest Family district #83 and former Paramount district #62, case programs were reassigned to neighboring districts. Once reassigned to the new CalWORKs offices, cases were reassigned to new GAIN Regional Offices for WTW program participation. GAIN Region I was impacted due to a lower caseload, while GAIN Region IV, V and VI experienced an increase in caseloads. Existing batch runs to identify newly approved CalWORKs cases is now assigning CalWORKs cases to other GAIN Regional offices. System assigns the newly approved cases to a GAIN Regional offices' Unassigned Pool. GAIN Staff are manually reassigning cases to Regional offices closest to the participant's physical address.

The Pending Unassigned Employment Services Program List page allows users to search by office (this is the WTW Office; however, the page displays the District Office).

1.2 Requests

Modify the Pending Unassigned Employment Service List page to assign WTW cases to designated GAIN Regional Offices' Unassigned Pool based on zip code and allow CalSAWS to identify the zip code of a participant's physical address and assign them to designated GAIN Regional Offices.

1.3 Overview of Recommendations

1. Update batch job PB19M112 to associate offices to the Pending Unassigned Programs based on zip code, automatically assigning newly active WTW cases to designated GAIN Regional Offices' Unassigned Pool.
2. Update page mapping for all fields on the page.
3. Add a column on the Pending Unassigned Employment Services Program List Page to identify zip codes of GAIN program participants.
4. Add 'Not Assigned to District Office' as another selection for office searching. This will allow GAIN (WTW/REP) staff to identify cases designated for their Regional Office.

5. Update the Office Detail page to allow county workers with security rights to update the office to zip code mapping. This will allow GAIN (WTW/REP) staff to identify zip codes designated for their Regional Office.

1.4 Assumptions

1. The method in which PB19M112 finds offices for REP, Cal-Learn, and GROW programs will not be modified.
2. Fields and functionality not mentioned will not be changed.
3. The U.S. Postal Service controls which zip codes belong to L.A. County, if the U.S. Postal Service adds or removes any Zip Codes for L.A. County, it will require a SCR/Work Item to add or remove them from this page.

2 RECOMMENDATIONS

2.1 Pending Unassigned Employment Services Program List

2.1.1 Overview

The Pending Unassigned Employment Services List page allows users to view a list of participants who have an Employment Services Program in pending status and have not been assigned to a case manager. The page does not allow users to identify zip codes of GAIN participants. There is also no option to search by 'Not Assigned to Office'.

Update the Pending Unassigned Employment Services List page to allow users to identify zip codes of GAIN services program participants, this will allow GAIN (WTW/REP) staff to identify cases with a physical address near their office.

Add an option on the Pending Unassigned Employment Services List page to search by 'Not Assigned to Office'.

2.1.2 Pending Unassigned Employment Services Program List ~~page~~Page Mockup

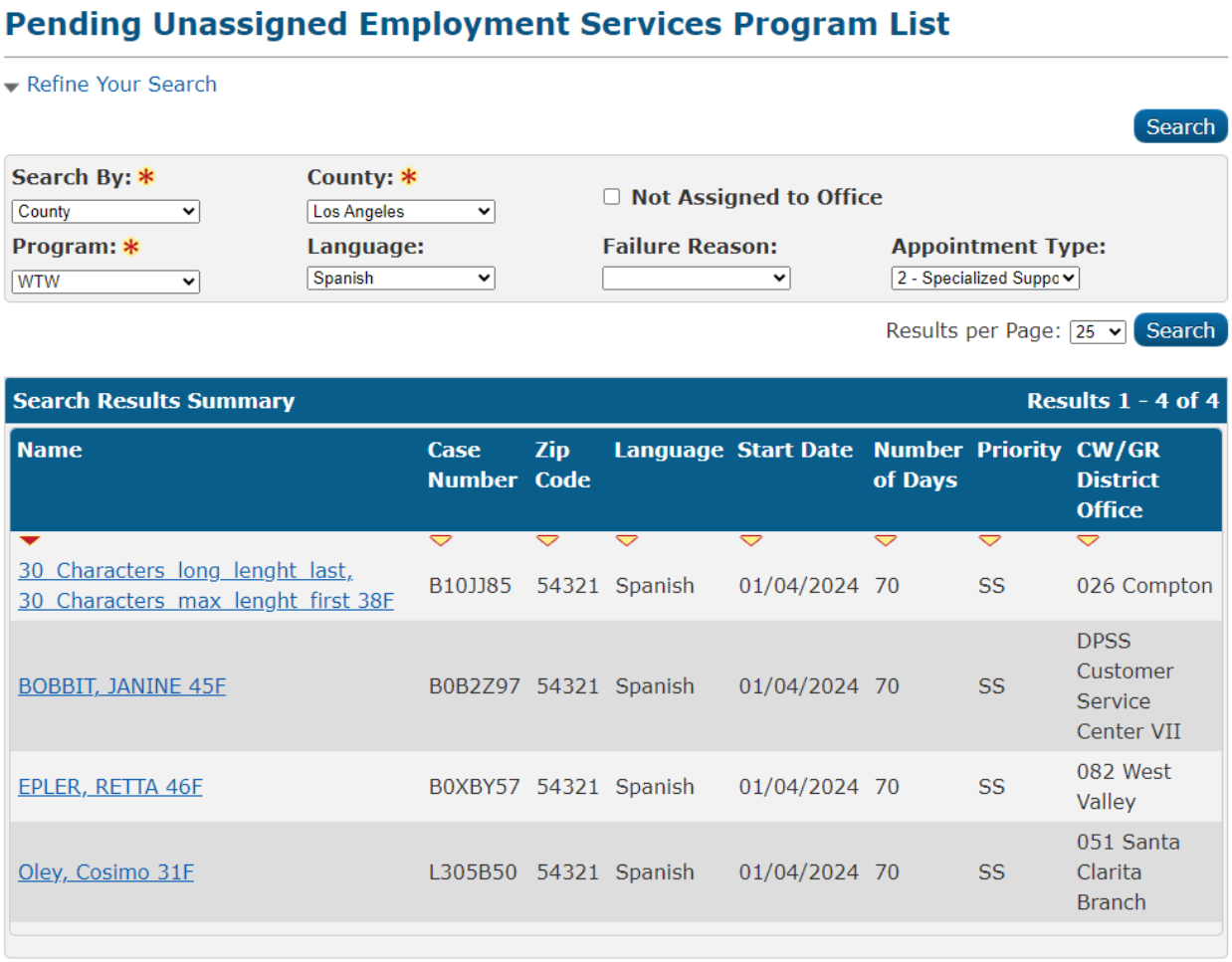

Figure 2.1.2.1 – New Search Criteria and New Zip Code Column

2.1.3 Description of Changes

1. Add 'Not Assigned to Office' as a search criterion:
    a. Only display this field when 'Search By' is set to "County"
    b. Display as a checkbox; when the checkbox is selected, only return result rows that have not been assigned to an office
2. Move the sortable column icons to a separate row, under the header row.
3. Add the following new column to the search results
    a. 'Zip Code' (The 5-digit zip code from the Physical Address of the associated person)

Note: See Accessibility Section

2.1.4 Page Location

- **Global: Employment Services**
- **Local: Workload Inventory**
- **Task: Pending Unassigned Employment Services Program**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for this page.

2.1.7 Accessibility

1. Update the sortable column table header icons with unique mouse-over/hover titles so that the titles end with the same text as the header's text.

   e.g., "Sort Ascending – Name" or "Sort Descending – Name" for the 'Name' column
2. Add unique Aria/Accessibility Tool labels to each sortable column table header icon so that the labels end with the same text as the header's text.
3. **e.g.**, "Sort Ascending – Name" or "Sort Descending – Name" for the 'Name' column

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Office Detail

2.2.1 Overview

Update the Office Detail page to allow county admins to update the office to zip code mapping used (by the Pending Unassigned Pool batch) to identify the zip codes designated to a displayed GAIN Regional Office.

2.2.2 Office Detail page Mockup

GAIN Services Zip Codes

Zip Code	Office Priority	Effective Date	Updated By
90031	2	02/22/2024	1355815
90037	1	02/22/2024	1355815
90038	1	02/22/2024	1355815
90039	2	02/26/2024	1355815
90041	2	03/01/2024	1355815
90042	2	03/01/2024	1355815
90050	2	03/12/2024	1355815
90057	1	03/12/2024	1355815
90062	1	01/01/2024	1355815
90065	2	01/02/2024	1355815
90068	1	01/02/2024	1355815
90071	1	01/02/2024	1355815
90076	1	01/11/2024	1355815
90089	1	01/11/2024	1355815

Figure 2.2.2.1 – GAIN Zip Codes Panel View Mode

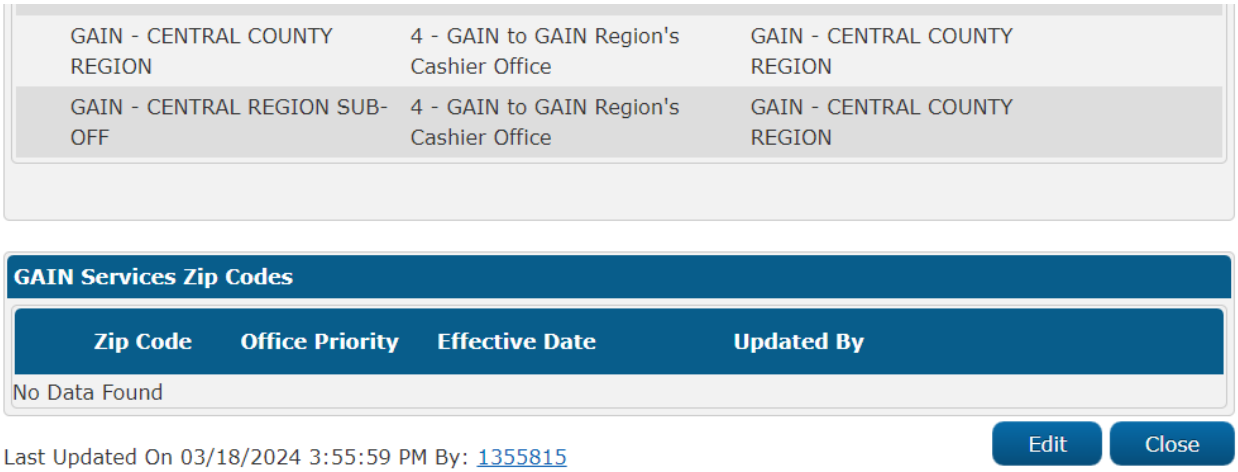

Figure 2.2.2.2 – No GAIN Services Zip Codes Found / View mode – partial page

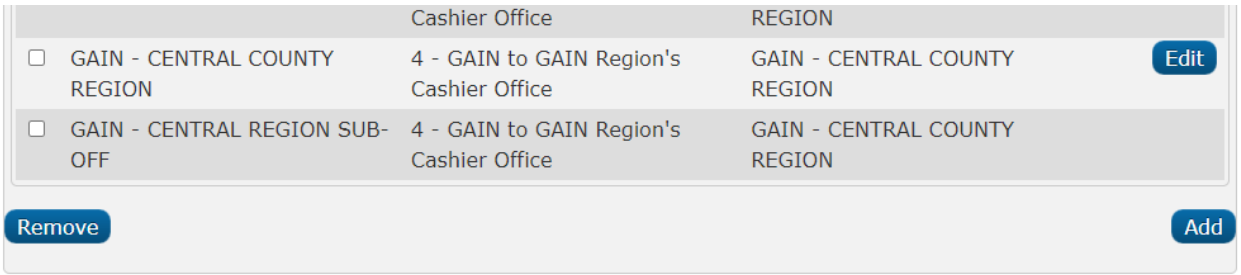

Figure 2.2.2.3 – No GAIN Services Zip Codes Found / Edit mode – partial page

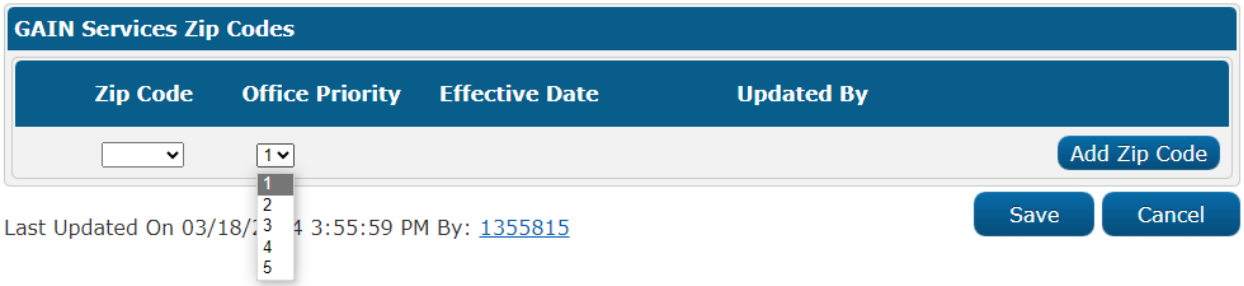

Figure 2.2.2.4 - Office Priority Dropdown (same for Add or Edit)

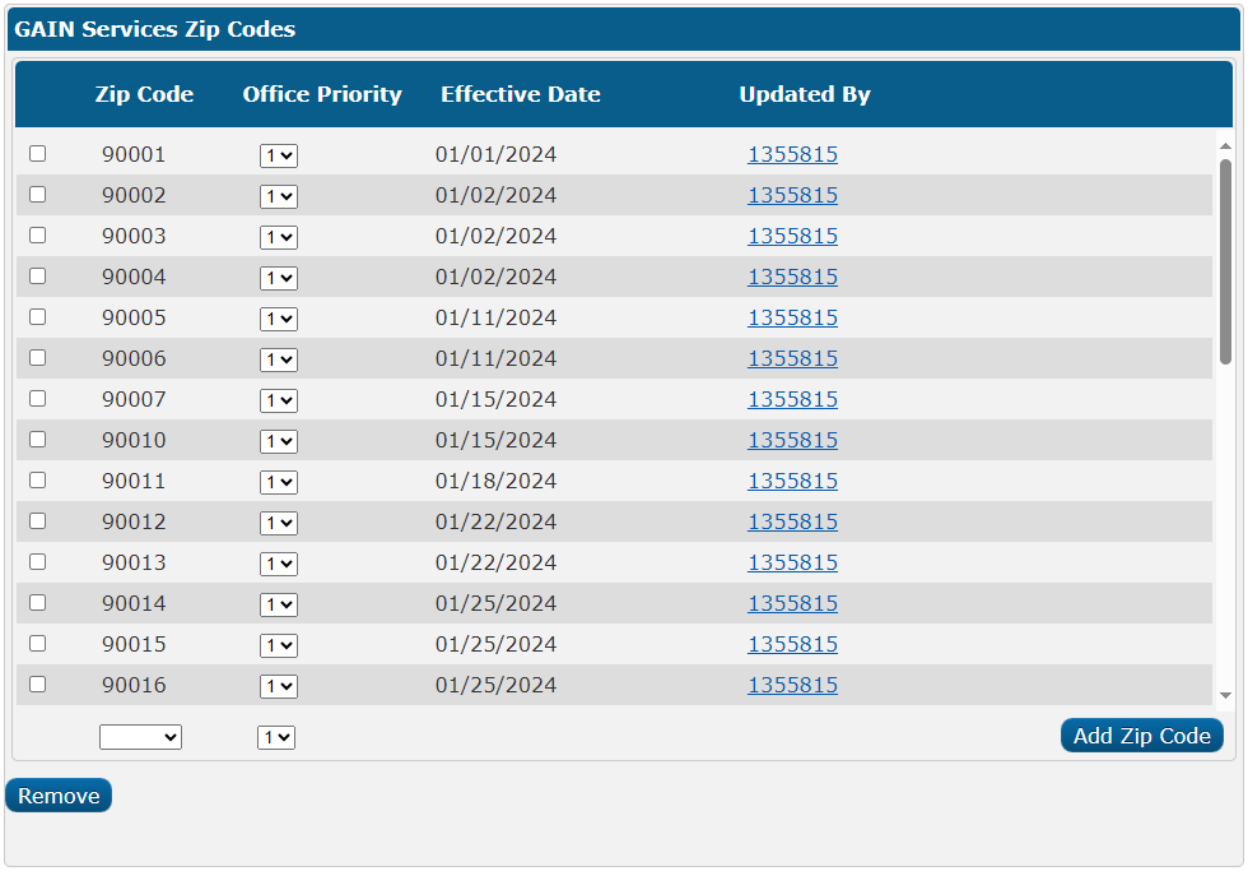

Figure 2.2.2.5 – GAIN Zip Codes Panel Edit Mode

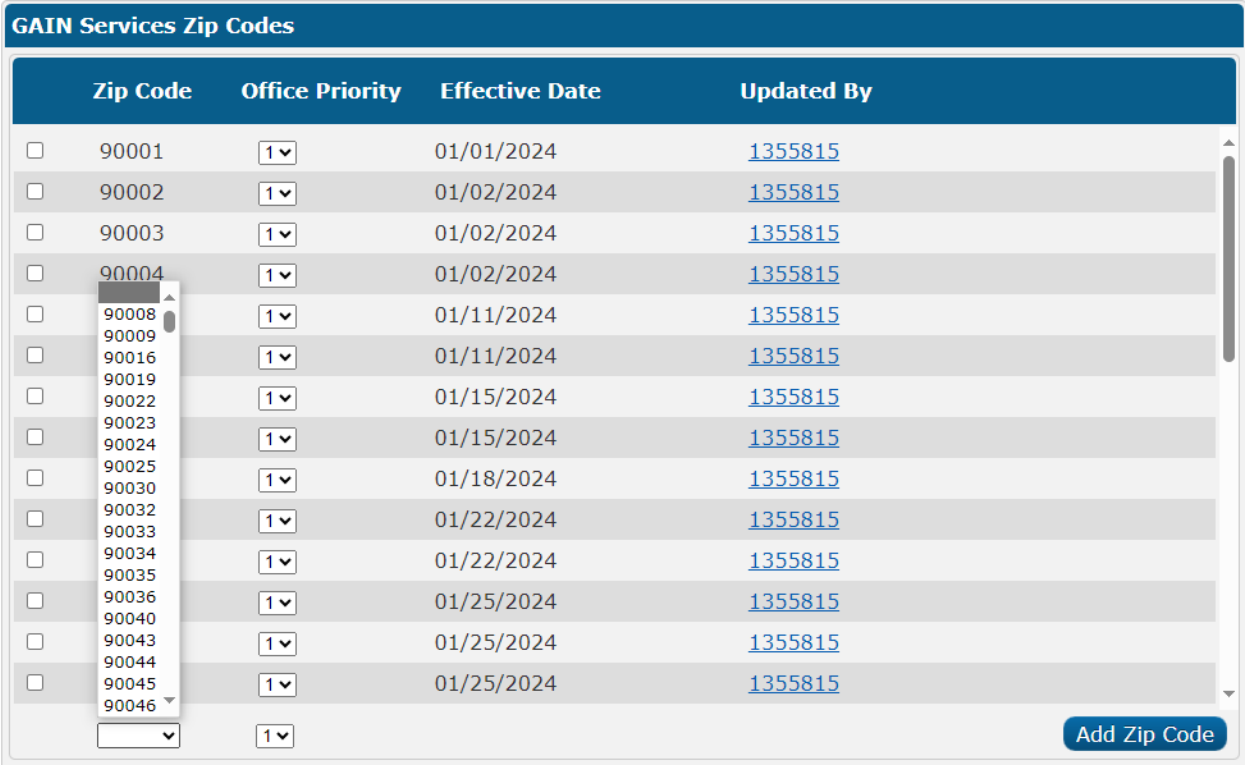

Figure 2.2.2.6 – Zip Code Dropdown Options

Office Detail

*- Indicates required fields

Save Cancel

- **Zip Code - The selected Zip Code is already associated to 5 offices, for GAIN services (GAIN - CUDAHY 06, GAIN - SOUTH FAMILY 31, GAIN - ONE STOP HARBOR SUB-OF, GAIN - CENTRAL REGION SUB-OFF, GAIN - METRO EAST 15). Please remove the GAIN Services Zip Code from at least 1 Office Detail page first.**

Figure 2.2.2.7 – Add Zip Code Validation Message – partial page

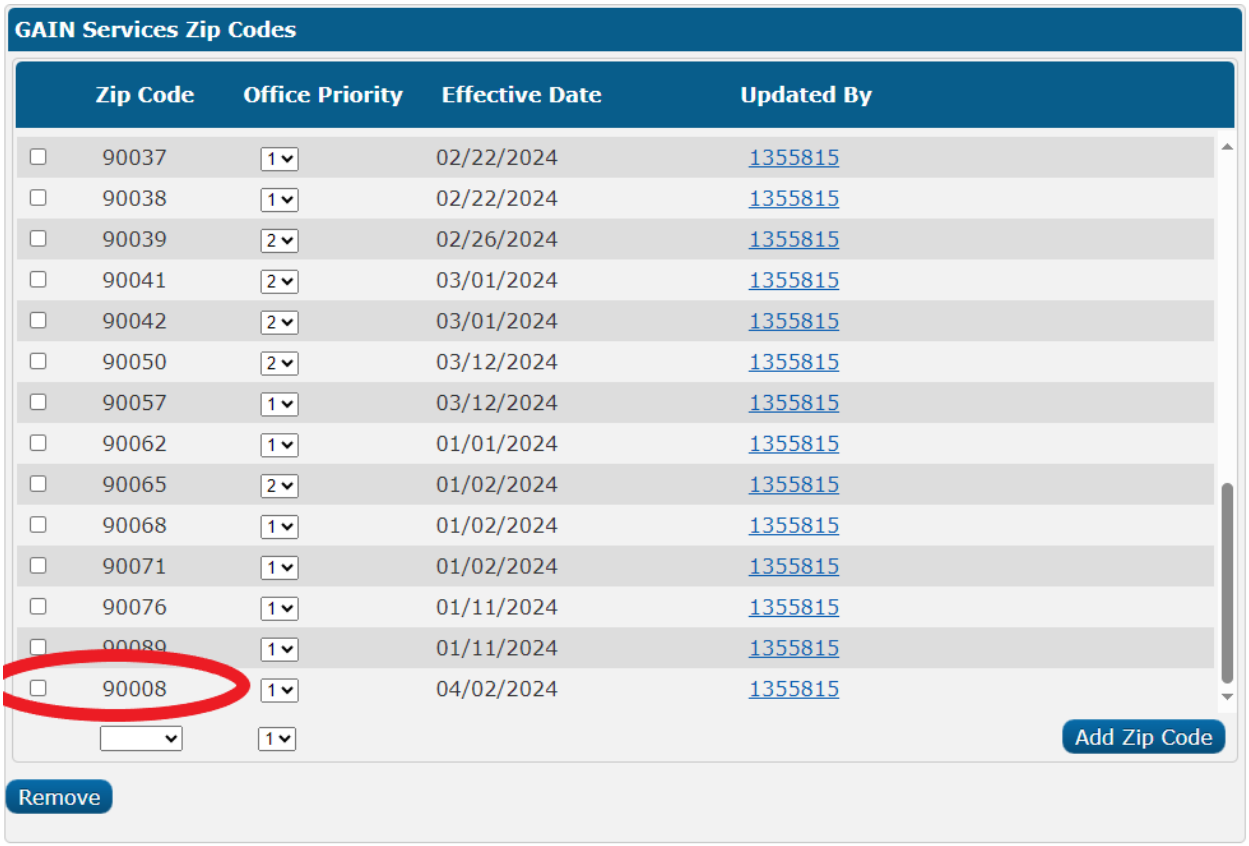

Figure 2.2.2.8 - New Zip Code Row

2.2.3 Description of Changes

1. Update The System to store all L.A. County zip codes and any associated GAIN office(s) for each Zip Code, with their 'Office Priority' setting.
   Note: See Supporting Documents for a list of L.A. County zip codes and a list of GAIN Regions and Feeder Districts having offices associated to, and prioritized for, GAIN; in case of any discrepancy between the two lists i.e., if one list has a Zip Code that the other list does not, use all Zip Codes.
2. Update the logic of the 'Remove' and 'Add' buttons on the 'Office Relationship' panel to require users to press the 'Save' button after the add or removal, before the edit is permanently saved/committed to the database.
3. Update the CalSAWS system to store a **Max_Offices** value representing the maximum number of offices that may be associated to a particular zip code, for GAIN Services program assignments. Set the **Max_Offices** value as (5).
4. Add a new 'GAIN Services Zip Codes' panel to the Office Detail page. This panel will hold an inner table with column headers only (the outer panel's title will act as the table's title):

Note: This panel will only be available to L.A. County.
Note: Users with security rights to access the page will be allowed to access this new panel/page section.

a. Add column headers:
    i. <Blank> (Leave a blank/no text header column)
        1. This column will hold a checkbox to select each individual row for removal)
        2. Display the checkbox(es) only in Edit mode

        Note: There will be **no** main checkbox to select all rows, but, multiple rows may be selected, individually, and removed at the same time.
    ii. Zip Code (the 5-digit zip code associated to the selected/displayed office); sort the table by 'Zip Code' in ascending order
    iii. Office Priority
        1. When in Edit mode, display the 'Office Priority' as a dropdown selector:
            a. Add options from 1 thru the Max_Offices value, **e.g.,** 1-5
            b. Add validation on this field, triggered on the 'Save' button:
            When/if the office is given the same priority as another office associated to the same zip code:
            Show a validation message as:
            as: "Office Priority – Office **<Identif> (<Office_Name>)** is already set to priority <Office Priority> for this Zip Code. Please select a different value.
            e.g., "Office Priority – Office **GN** (**GAIN - SOUTH FAMILY 31)** is already set to priority 1 for this Zip Code. Please select a different value."
            c. Clicking the link on the validation message will put focus on this selector dropdown
        2. When in View mode, display the 'Office Priority' as static text
    iv. Effective Date (the date the zip code was associated to the office, for GAIN services)
    v. Updated By
        1. This field will hold the Staff ID of the user who added the zip code association
        2. Clicking a link on this field will navigate to the Worker Detail page

b. Populate the table with all zip codes associated to the displayed office, sorted by 'Zip Code' in ascending order

c. Add a table and table row, outside of the scrollable results table, for selecting a new zip code, to associate with the office, for GAIN:
Note: This row will display below the results table so that a new row may be added without the need to scroll.
    i. Add a Zip Code selector dropdown:
        1. Populate this dropdown with each L.A. County Zip Code that is <u>not</u> already associated to the selected office
        2. Add a validation on this field, triggered on the 'Add Zip Code' button; when/if the button is pressed without selecting a Zip Code to add:
            a. Display the validation as: "Zip Code – Please Select a Zip Code to Add."
            b. Clicking the link on the validation message will put focus on this selector dropdown
        3. Add a 2nd validation on this field, triggered on the 'Add Zip Code' button; when/if the selected zip code is already associated to the maximum number of offices, for GAIN services, represented by the Max_Offices value:
            a. Display the validation as: "Zip Code – The selected Zip Code is already associated to **<Max_Offices>** offices, for GAIN services (**<Office_Name, Office_Name, Office_Name, Office_Name, Office_Name>**). Please remove the GAIN Services Zip Code from at least 1 Office Detail page first."
            e.g., "Zip Code – The selected Zip Code is already associated to **5** offices, for GAIN services **(GAIN - CUDAHY 06, GAIN - SOUTH FAMILY 31, GAIN - ONE STOP HARBOR SUB-OF, GAIN - CENTRAL REGION SUB-OFF, GAIN - METRO EAST 15).** Please remove the GAIN Services Zip Code from at least 1 Office Detail page first." (see figure 2.2.2.7)
            b. Clicking the link on the validation message will put focus on this selector dropdown
    ii. Add a dropdown selector populated with options 1-5 for selecting the office's priority, for the zip code (default to 1)
        1. Add validation on this field, triggered on the 'Add Zip Code' button:
            a. When/if the office is given the same priority as another office associated to the same zip code, show a validation message as: "Office Priority – Office **<Identif>**

(<Office_Name>) is already set to priority <Office Priority> for this Zip Code. Please select a different value.

e.g., "Office Priority – Office GN (GAIN - SOUTH FAMILY 31) is already set to priority 1 for this Zip Code. Please select a different value."

b. Clicking the link on the validation message will put focus on this selector dropdown

iii. Add an 'Add Zip Code' button. This button will:

1. Validate the 'Zip Code' dropdown and the 'Office Priority' dropdown selections
2. Display the new row at the bottom of the existing results

Note: The newly added record will be at the bottom of the list and unsorted until/unless the user saves the page.

d. When no results were returned:

i. In View mode, populate the table with static text 'No Data Found'

ii. In Edit mode, show the table row for selecting a new zip code (see above)

5. Add a 'Remove' button, outside of the new table but inside of the new panel. This button will:
   a. Display only when at least 1 result was returned for the table
   b. Remove the selected row(s), but, the removal will not be saved until/unless the user saves the page with the 'Save' button
   c. Validate at least one row was selected for removal; when/if the button is pressed without selecting a zip code to remove:
      i. Display the validation as: "Remove – Please Select a Zip Code to Remove."
      ii. Clicking the link on the validation message will put focus on this button

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Add page mapping for this page.

2.2.7 Accessibility

1. Add ARIA / Accessibility tool labels to each remove row checkbox, including those already existing on the page, as: "Remove Check Box"
2. Update each active page elements' ID attribute to be unique, for example, 'SaveTop' or 'SaveBottom' for the top and bottom save buttons. **Note**: These are examples only; the ID attributes will be chosen by the developers or chosen programmatically by developer's tools; they do not show on the page but are used by accessibility tools such as screen readers.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Modify Pending Unassigned Pool Batch

2.3.1 Overview

PB19M112 is the Pending Unassigned Pool batch, which inserts all pending programs (WTW, REP, Cal-Learn, and GROW) that don't have a worker assigned into the pending unassigned pool. Modify assignment logic for WTW programs to associate offices to pending unassigned programs based on zip code.

2.3.2 Description of Change

1. Modify batch job PB19M112 to do the following:
    a. Automatically assign the Employment Service Office of newly pending WTW participants to designated GAIN Regional Offices' Unassigned Pool, based on the zip code of the participant's physical address. The initial list of zip codes and regions can be found in the GAIN Regions and Feeder Districts supporting document and will be added as a table in this SCR.
        i. If a zip code is associated to more than 1 office, attempt to make assignments in a round robin fashion, starting with the office with the highest priority, with 1 indicating the highest priority.
        ii. Consider the following example. There are 10 participants with zip code 90000, and zip code 90000 is associated with office A, B, and C, which are ranked 1, 2, and 3. In the first round, the batch job should assign 1 to office A, 1 to office B, and 1 to office C. In the second round, the batch job should again assign 1 to office A, 1 to office B, and 1 to office C. At the end of assignments for zip code 90000, office A should have 4 participants, and office B and office C should have 3 participants each.
    b. If a GAIN Regional Office cannot be found based on the zip code of the participant's physical address, attempt to make an assignment with existing Office Relationship functionality.
        i. If an office still cannot be found with existing Office Relationship functionality, skip assignment for reason 'No Valid Physical/Mailing Address'.

2.3.3 Execution Frequency

No change.

2.3.4 Key Scheduling Dependencies

No change.

2.3.5 Counties Impacted

Los Angeles County only

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

N/A

2.3.8 Failure Procedure/Operational Instructions

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

2.4 Automated Regression Test

2.4.1 Overview

Create new automated regression test scripts to verify the display of the new fields on the Pending Unassigned Employment Services Program List page, and the functionality of the GAIN Services Zip Codes section of the Office Detail page.

2.4.2 Description of Change

Create new regression scripts to cover the following scenarios:

1. Verify that the 'Not Assigned to Office' checkbox displays on the Pending Unassigned Employment Services Program List page when the 'Search By' selection is "County" and does not display when another value is selected.
2. Verify that the 'Zip Code' column displays in the search results on the Pending Unassigned Employment Services Program List page.
3. Verify that a page mapping exists for each applicable field on the Pending Unassigned Employment Services Program List page.
4. Verify that the GAIN Services Zip Codes section displays on the Office Detail page for a Los Angeles County office.
5. Verify that the GAIN Services Zip Codes section does not display on the Office Detail page for an office not in Los Angeles County.
6. Verify that records can be added to the GAIN Services Zip Codes section of the Office Detail page while in edit mode, and that:
    a. When the page is saved, any new or updated records display in view mode.
    b. When the page is not saved, any changes are discarded.
7. Verify that records can be removed from the GAIN Services Zip Codes section of the Office Detail page while in edit mode, and that:
    a. When the page is saved, any removed records no longer display in view mode.
    b. When the page is not saved, any records that were selected for removal continue to display in view mode.
8. Verify that the Zip Code field in the GAIN Services Zip Codes section contains all Zip Code values associated to Los Angeles County.
9. Verify that a validation message displays on the Office Detail page in each of the following situations:
    a. 'Save' is clicked when multiple records for the same Zip Code and Office Priority exist in the GAIN Services Zip Codes section.
    b. 'Add Zip Code' is clicked when a previous GAIN Services Zip Codes record is incomplete (ex., either Zip Code or Office Priority is selected, but not both).
    c. 'Remove' is clicked when no GAIN Services Zip Codes records were selected for removal.

3 SUPPORTING DOCUMENTS

Number	Description	Attachment
1	GAIN Regions and Feeder Districts	CA-251475 GAIN Regions and Feeder Districts 1.xlsx CA-251475 GAIN Regions and Feeder D
2	LA_County_ZIP_Codes from LA County ZIP Codes | County of Los Angeles Open Data	 LA_County_ZIP_Codes.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.28.1.12	The LRS shall maintain a real-time online list of potential participants (e.g., unassigned pool or participant pool) that can be viewed, sorted, and/or printed by COUNTY-specified Users, including: a. Participant demographic data; b. Plan counter for program-specific work participation program plan (e.g., GAIN 90-day WtW Plan or GROW Vocation Assessment Employment Plan); c. Time clock information for program-specific time limits; d. Prior work participation program activities; e. Prior work participation program activity dates; and f. Participant assignment priority.	This SCR is adding the functionality for cases to be assigned based on Zip Code.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-264616

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

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/01/2023	1	Initial Document	Susanna Martinez
8/14/2024	2	Content Revision 1: • Update definition of Line 53 item in sections 2.1.3.3.l and 2.2.3.1.d • Update the STAT 47 Part F Backup Report template to add new columns in section 2.2 • Cosmetic update to STAT 47 template for PART C Item 13a and 13b	Susanna Martinez
8/19/2024	3	Content Revision 1 update: • Update STAT 47 Part F Backup Report template to add new column in section 2.2 • Update STAT 47 Part F Backup Report template to add filters to the sheet	Susanna Martinez
8/26/2024	4	Content Revision 1 update: • Update definition of Line 53 item in sections 2.1.3.3.l and 2.2.3.1.d • Add assumption #4, #11, and #12 • Added notes to Appendix item	Susanna Martinez
9/16/2024	5	Content Revision 2: • Cosmetic correction to section 2.1.3.1.h.vii • Cosmetic update for line 9 and 15 of the STAT 47 Mockup • Remove assumption 12 • Update section 2.3.1.3.g.i to account for GROW activities in PART B item 4 of the STAT 47 • Add section 2.3.1.4	Susanna Martinez

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1 OVERVIEW

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

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

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

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

1.1 Current Design

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

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. The updated customer activities done under SCR CA-230837 will be used to map to the new CFET components.
2. SCR CA-230837 provided the counties with a case list of affected cases having activities that need to be end-dated and added to a new activity countable towards one of the new CFET components on the STAT 47. This was provided to assist the counties in editing cases needing to be remapped to one of the updated activities, ensuring they are captured at the time of the next STAT 47 report generation following the updates made per this SCR, CA-264616. "CIT 0079-24 New CFET Activities and CA-230837 Lists of CFET Activities and Resources with Services Removed" was shared with the counties to address this.
3. The mapping of GROW customer activities to the new CFET components depends on the completion of changes to the GROW customer activities done under SCR CA-254559.
4. The new GROW activities added under CA-254559 will be deployed in the system in a disabled state and will not be selectable/available to the user. These new GROW activities will be enabled under SCR CA-281036. This SCR, CA-264616, will still complete the changes to map the new GROW activities to the new CFET components but the new GROW activities will not be present in the report until SCR CA-281036 gets deployed into the system. This affects the following GROW activities:
    a. Activity #1 - EDU
    b. Activity #2 - EDU
    c. Activity #3 - EDU
    d. Activity #4- WEP
    e. Activity #5- WEP
    f. Activity #6- WEP
    g. Activity #7-WEP
    h. Activity #8-SJS
    i. Activity #9-SJS

j. Activity #10- SET
k. Apprenticeship
l. Assessment
m. Career Exploration Month #1
n. Career Exploration Month #2
o. Career Exploration Month #3
p. Careers for a Cause (C4C)
q. CFET Retention Services
r. Community College
s. Entrepreneurship
t. Financial Literacy
u. GROW Transition-Age Youth Employment Program (GTEP)
v. GROW Youth Employment Program (GYEP)
w. License/Certificate/Exam (LCE)
x. Life Skills
y. Ready, Set, START!
z. RightWay
aa. START Learning
bb. START ORIENTATION
cc. Subsidized Employment
dd. TAYPortunity Program
ee. TAYPortunity Transitional Subsidized Employment
ff. Unsubsidized Employment
gg. Vocational Assessment
hh. Workfare

5. SCR CA-280180 will address and implement the 90-day lookback criteria per ACL 22-67E.
6. SCR CA-266312 updated the ABAWD age limit and added exemptions for homeless individuals, veterans, and Foster Care individuals. These changes are being picked up by the STAT 47.
7. The user should select the 'EDU Prog. Basic (EPB)' component if the participant is in ABE, HSD and GED, in order to be counted towards the Education Program Basic (EPB) CFET component on the STAT 47.
8. The user should select the 'EDU Prog. Career (EPC)' component if the participant is in CTE and Vocational Training, in order to be counted towards the Education Program Career (EPC) CFET component on the STAT 47.
9. The user should select the 'EDU Prog. English Language (EPEL)' component if the participant is in ESL and ELL, in order to be counted towards the Education Program English Language (EPEL) CFET component on the STAT 47.
10. The user should select the 'EDU Prog. Integrated (EPI)' component if the participant is in Bridge Programs, in order to be counted towards the Education Program Integrated (EPI) CFET component on the STAT 47.
11. A CFET program to a CFET program person is a one-to-one relationship.
12. ~~GROW activities are currently not counted in the PART B item 4 population.~~

2 RECOMMENDATIONS

2.1 STAT 47

2.1.1 Overview

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

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

2.1.2 STAT 47 Mockup

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
DATA SYSTEMS AND SURVEY DESIGN BUREAU

Non-Assistance CalFresh Work Registrants,
Able-Bodied Adults Without Dependents (ABAWD),
and Employment and Training (E&T) Program
Quarterly Statistical Report
STAT 47

DOWNLOAD REPORT FORM FROM:
http://www.cdss.ca.gov/dssdb
E-MAIL REPORT FORM TO:
admsta147@dss.ca.gov

COUNTY NAME	VERSION	REPORT QUARTER	REPORT YEAR
San Bernardino	☐ INITIAL ☐ REVISED	Jul. - Sep.	2022/2023

PART A. WORK REGISTRANT AND ABAWD INFORMATION (All Counties) Count each work registrant and ABAWD in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
1. Unduplicated new work registrants during the quarter	1,574	2,608	1,948	6,130
2. Unduplicated new ABAWDs during the quarter (include in Item 1)	744	1,123	859	2,726
3. ABAWDs exempt under the 15% criteria during the quarter	0	0	0	0

PART B. NEW INDIVIDUAL E&T PARTICIPANTS (E&T Counties Only) Count each participant in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
4. New individuals who participated in E&T during the quarter (Items 4a plus 4b)	28	5	1	34
a. Unduplicated ABAWD participants	15	0	0	15
b. Unduplicated non-ABAWD participants	13	5	1	19

PART C. NEW E&T COMPONENT PLACEMENTS (E&T Counties Only) For each component placement, count the participants in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
5. New job search participants placed during the quarter (Items 5a plus 5b)	10	3	0	13
a. ABAWD placements	6	0	0	6
b. Non-ABAWD placements	4	3	0	7
6. New job club participants placed during the quarter (Items 6a plus 6b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
7. New workfare participants placed during the quarter (Items 7a plus 7b)	18	3	1	22
a. ABAWD participants	9	0	0	9
b. Non-ABAWD placements	9	3	1	13
8. New self-initiated workfare participants placed during the quarter (Items 8a plus 8b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
9. New work experience (on-the-job training OJT) participants placed during the quarter (Items 9a plus 9b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
10. New vocational training participants placed during the quarter (Items 10a plus 10b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
11. New education participants placed during the quarter (Items 11a plus 11b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
12. New job retention participants placed during the quarter (Items 12a plus 12 b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
13. New participants placed in other components offered by the county during the quarter (Items 13a plus 13b)	0	0	0	0
a. ABAWD placements (List components in Item 13a/13b explanation box)	0	0	0	0
b. Non-ABAWD placements (List components in Item 13a/13b explanation box)	0	0	0	0
14. Total of new unduplicated placements in all component categories during the quarter (Items 14a plus 14b)	28	6	1	35
a. ABAWD placements	15	0	0	15
b. Non-ABAWD placements	13	6	1	20

PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (E&T Counties Only) Count each participant in each applicable month each quarter.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
15. Job search participants by month during the quarter (Items 15a plus 15b)	26	24	19	69
a. ABAWD placements	16	13	11	40
b. Non-ABAWD placements	10	11	8	29
16. Job club participants by month during the quarter (Items 16a plus 16b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
17. Workfare participants by month during the quarter (Items 17a plus 17b)	50	45	41	136
a. ABAWD placements	28	24	22	74
b. Non-ABAWD placements	22	21	19	62
18. Self-initiated workfare participants by month during the quarter (Items 18a plus 18b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
19. Work experience (OJT) participants by month during the quarter (Items 19a plus 19b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
20. Vocational training participants by month during the quarter (Items 20a plus 20b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
21. Education participants by month during the quarter (Items 21a plus 21b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
22. Job retention participants by month during the quarter (Items 22a plus 22b)	1	1	1	3
a. ABAWD placements	0	1	1	2
b. Non-ABAWD placements	1	0	0	1
23. Participants in other components offered by the county by month during the quarter (Items 23a plus 23b)	0	0	0	0
a. ABAWD placements (List components in Item 23a/23b explanation box)	0	0	0	0
b. Non-ABAWD placements (List components in Item 23a/23b explanation box)	0	0	0	0

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

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

COMMENTS:

REVISED REPORT EXPLANATION

ITEMS 13a/13b NEW PARTICIPANTS PLACED IN OTHER COMPONENTS EXPLANATION (Complete if Cells 121-132 are not all zero)

ITEMS 23a/23b PERSONS PARTICIPATING IN OTHER COMPONENTS EXPLANATION (Complete if Cells 241-252 are not all zero)

CONTACT PERSON	TELEPHONE	EXTENSION	FAX
JOB TITLE/CLASSIFICATION	E-MAIL	DATE SUBMITTED	

Figure 2.1.2.1 – STAT 47 Summary Sheet Mockup Before Changes

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES
DATA SYSTEMS AND SURVEY DESIGN BUREAU

CalFresh Work Registrants,
Able-Bodied Adults Without Dependents (ABAWD),
and Employment and Training (E&T) Program
Quarterly Statistical Report
STAT 47

DOWNLOAD REPORT FORM FROM:
http://www.cdss.ca.gov/dssdb
E-MAIL REPORT FORM TO:
admstat47@dss.ca.gov

COUNTY NAME	VERSION	REPORT QUARTER	REPORT YEAR
San Bernardino	☐ INITIAL ☐ REVISED	Oct. - Dec.	2023/2024

PART A. WORK REGISTRANT AND ABAWD INFORMATION (All Counties) Count each work registrant and ABAWD in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
1. Unduplicated new work registrants during the quarter	0	0	0	0
2. Unduplicated new ABAWDs during the quarter (Include in Item 1)	0	0	0	0
3. Total number of discretionary exemptions used during the quarter	0	0	0	0

PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
4. New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter (Items 4a plus 4b)	0	0	0	0
a. Unduplicated ABAWD participants	0	0	0	0
b. Unduplicated non-ABAWD participants	0	0	0	0

PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
5. New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
6. New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c)	0	0	0	0
a. ABAWD in qualifying component placements (WIOA and Veterans Programs)	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
c. ABAWD in non-qualifying component placements	0	0	0	0
7. New Workfare (W) participants placed during the quarter (Items 7a plus 7b)	0	0	0	0
a. ABAWD participants	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
8. New Self-Employment Training (SET) participants placed during the quarter (Items 8a plus 8b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
9. New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
Education Components				
10. New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
11. New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
12. New Education Program English Language (EPEL) participants placed during the quarter (includes ESL and ELL) (Items 12a plus 12b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
13. New Education Program Integrated (EPI) participants placed during the quarter (includes Bridge Programs) (Items 13a plus 13b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
14. New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0

Work Experience Components								
15. New Work Activity (WA) participants placed during the quarter (Items 15a plus 15b)	149	0	150	0	151	0	152	0
a. ABAWD placements	153	0	154	0	155	0	156	0
b. Non-ABAWD placements	157	0	158	0	159	0	160	0
16. New Work-Based Learning Internship (WBLI) participants placed during the quarter (Items 16a plus 16b)	161	0	162	0	163	0	164	0
a. ABAWD placements	165	0	166	0	167	0	168	0
b. Non-ABAWD placements	169	0	170	0	171	0	172	0
17. New Work-Based Learning Internship Subsidized (WBLI-SUB) participants placed during the quarter (Items 17a plus 17b)	173	0	174	0	175	0	176	0
a. ABAWD placements	177	0	178	0	179	0	180	0
b. Non-ABAWD placements	181	0	182	0	183	0	184	0
18. New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b)	185	0	186	0	187	0	188	0
a. ABAWD placements	189	0	190	0	191	0	192	0
b. Non-ABAWD placements	193	0	194	0	195	0	196	0
19. New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b)	197	0	198	0	199	0	200	0
a. ABAWD placements	201	0	202	0	203	0	204	0
b. Non-ABAWD placements	205	0	206	0	207	0	208	0
20. New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b)	209	0	210	0	211	0	212	0
a. ABAWD placements	213	0	214	0	215	0	216	0
b. Non-ABAWD placements	217	0	218	0	219	0	220	0
21. New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b)	221	0	222	0	223	0	224	0
a. ABAWD placements	225	0	226	0	227	0	228	0
b. Non-ABAWD placements	229	0	230	0	231	0	232	0
22. New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b)	233	0	234	0	235	0	236	0
a. ABAWD placements	237	0	238	0	239	0	240	0
b. Non-ABAWD placements	241	0	242	0	243	0	244	0
23. New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b)	245	0	246	0	247	0	248	0
a. ABAWD placements	249	0	250	0	251	0	252	0
b. Non-ABAWD placements	253	0	254	0	255	0	256	0
24. New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b)	257	0	258	0	259	0	260	0
a. ABAWD placements	261	0	262	0	263	0	264	0
b. Non-ABAWD placements	265	0	266	0	267	0	268	0
25. New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b)	269	0	270	0	271	0	272	0
a. ABAWD placements	273	0	274	0	275	0	276	0
b. Non-ABAWD placements	277	0	278	0	279	0	280	0
26. New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b)	281	0	282	0	283	0	284	0
a. ABAWD placements	285	0	286	0	287	0	288	0
b. Non-ABAWD placements	289	0	290	0	291	0	292	0

PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.		Month 1 (A)		Month 2 (B)		Month 3 (C)		Quarter Total (D)
27. Supervised Job Search (SJS) participants by month during the quarter (Items 27a plus 27b plus 27c)	293	0	294	0	295	0	296	0
a. ABAWD in qualifying component placements (WIOA and Veterans Programs)	297	0	298	0	299	0	300	0
b. Non-ABAWD placements	301	0	302	0	303	0	304	0
c. ABAWD in non-qualifying component placements	305	0	306	0	307	0	308	0
28. Workfare (W) participants by month during the quarter (Items 28a plus 28b)	309	0	310	0	311	0	312	0
a. ABAWD placements	313	0	314	0	315	0	316	0
b. Non-ABAWD placements	317	0	318	0	319	0	320	0
29. Self-Employment Training (SET) participants by month during the quarter (Items 29a plus 29b)	321	0	322	0	323	0	324	0
a. ABAWD placements	325	0	326	0	327	0	328	0
b. Non-ABAWD placements	329	0	330	0	331	0	332	0
30. Job Retention (JR) participants by month during the quarter (Items 30a plus 30b)	333	0	334	0	335	0	336	0
a. ABAWD placements	337	0	338	0	339	0	340	0
b. Non-ABAWD placements	341	0	342	0	343	0	344	0
Education Components								
31. Education Program Basic (EPB) participants placed by month during the quarter (includes ABE, HSD and GED) (Items 31a plus 31b)	345	0	346	0	347	0	348	0
a. ABAWD placements	349	0	350	0	351	0	352	0
b. Non-ABAWD placements	353	0	354	0	355	0	356	0
32. Education Program Career (EPC) participants by month during the quarter (includes CTE and Vocational training) (Items 32a plus 32b)	357	0	358	0	359	0	360	0
a. ABAWD placements	361	0	362	0	363	0	364	0
b. Non-ABAWD placements	365	0	366	0	367	0	368	0
33. Education Program English Language (EPEL) participants by month during the quarter (includes ESL and ELL) (Items 33a plus 33b)	369	0	370	0	371	0	372	0
a. ABAWD placements	373	0	374	0	375	0	376	0
b. Non-ABAWD placements	377	0	378	0	379	0	380	0
34. Education Program Integrated (EPI) participants by month during the quarter (includes Bridge Programs) (Items 34a plus 34b)	381	0	382	0	383	0	384	0
a. ABAWD placements	385	0	386	0	387	0	388	0
b. Non-ABAWD placements	389	0	390	0	391	0	392	0
35. Education Program Work Readiness Training (EPWRT) participants by month during the quarter (Items 35a plus 35b)	393	0	394	0	395	0	396	0
a. ABAWD placements	397	0	398	0	399	0	400	0
b. Non-ABAWD placements	401	0	402	0	403	0	404	0

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

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

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

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

Figure 2.1.2.2 – STAT 47 Summary Sheet Mockup After Changes

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

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

Non-Assistance CalFresh Work Registrants,
Able-Bodied Adults Without Dependents (ABAWD),
and Employment and Training (E&T) Program
Quarterly Statistical Report
STAT 47

Figure 2.1.2.3 – STAT 47 Summary Sheet Mockup Before Title Changes

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

CalFresh Work Registrants,
Able-Bodied Adults Without Dependents (ABAWD),
and Employment and Training (E&T) Program
Quarterly Statistical Report
STAT 47

Figure 2.1.2.4 – STAT 47 Summary Sheet Mockup After Title Changes

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

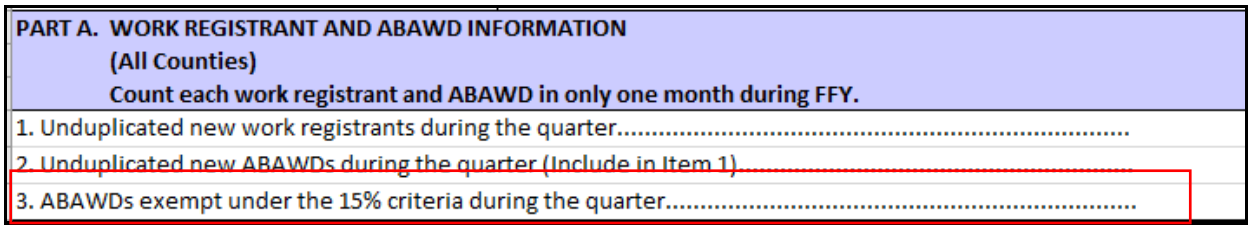

Figure 2.1.2.5– STAT 47 Summary Sheet Item 3 Before Changes

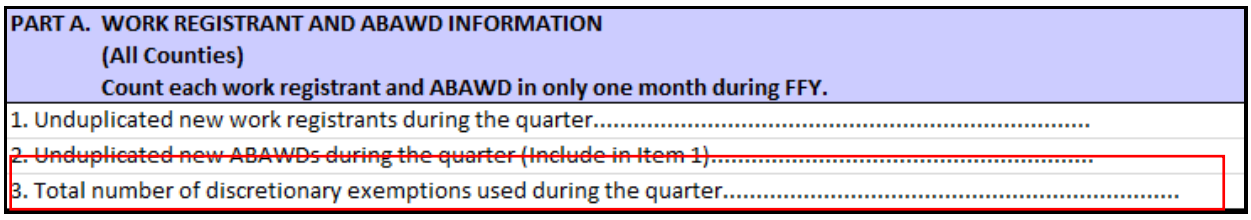

Figure 2.1.2.6 – STAT 47 Summary Sheet Item 3 After Changes

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

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

Figure 2.1.2.7 – STAT 47 Summary Sheet PART B Before Changes

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

Figure 2.1.2.8 – STAT 47 Summary Sheet PART B After Changes

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

PART C. NEW E&T COMPONENT PLACEMENTS (E&T Counties Only) For each component placement, count the participants in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
5. New job search participants placed during the quarter (Items 5a plus 5b).....	10	3	0	13
a. ABAWD placements.....	6	0	0	6
b. Non-ABAWD placements.....	4	3	0	7
6. New job club participants placed during the quarter (Items 6a plus 6b).....	0	0	0	0
a. ABAWD placements.....	0	0	0	0
b. Non-ABAWD placements.....	0	0	0	0
7. New workfare participants placed during the quarter (Items 7a plus 7b).....	18	3	1	22
a. ABAWD participants.....	9	0	0	9
b. Non-ABAWD placements.....	9	3	1	13
8. New self-initiated workfare participants placed during the quarter (Items 8a plus 8b).....	0	0	0	0
a. ABAWD placements.....	0	0	0	0
b. Non-ABAWD placements.....	0	0	0	0
9. New work experience (on-the-job training OJT) participants placed during the quarter (Items 9a plus 9b)	0	0	0	0
a. ABAWD placements.....	0	0	0	0
b. Non-ABAWD placements.....	0	0	0	0
10. New vocational training participants placed during the quarter (Items 10a plus 10b).....	0	0	0	0
a. ABAWD placements.....	0	0	0	0
b. Non-ABAWD placements.....	0	0	0	0
11. New education participants placed during the quarter (Items 11a plus 11b).....	0	0	0	0
a. ABAWD placements.....	0	0	0	0
b. Non-ABAWD placements.....	0	0	0	0
12. New job retention participants placed during the quarter (Items 12a plus 12 b).....	0	0	0	0
a. ABAWD placements.....	0	0	0	0
b. Non-ABAWD placements.....	0	0	0	0
13. New participants placed in other components offered by the county during the quarter (Items 13a plus 13b).....	0	0	0	0
a. ABAWD placements (List components in Item 13a/13b explanation box).....	0	0	0	0
b. Non-ABAWD placements (List components in Item 13a/13b explanation box).....	0	0	0	0
14. Total of new unduplicated placements in all component categories during the quarter (Items 14a plus 14b).....	28	6	1	35
a. ABAWD placements.....	15	0	0	15
b. Non-ABAWD placements.....	13	6	1	20

Figure 2.1.2.9 – STAT 47 Summary Sheet PART C Before Changes

PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.	Month 1 (A)	Month 2 (B)	Month 3 (C)	Quarter Total (D)
5. New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
6. New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c)	0	0	0	0
a. ABAWD in qualifying component placements (WIOA and Veterans Programs)	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
c. ABAWD in non-qualifying component placements	0	0	0	0
7. New Workfare (W) participants placed during the quarter (Items 7a plus 7b)	0	0	0	0
a. ABAWD participants	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
8. New Self-Employment Training (SET) participants placed during the quarter (Items 8a plus 8b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
9. New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
Education Components				
10. New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
11. New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
12. New Education Program English Language (EPEL) participants placed during the quarter (includes ESL and ELL) (Items 12a plus 12b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
13. New Education Program Integrated (EPI) participants placed during the quarter (includes Bridge Programs) (Items 13a plus 13b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
14. New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
Work Experience Components				
15. New Work Activity (WA) participants placed during the quarter (Items 15a plus 15b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
16. New Work-Based Learning Internship (WBLI) participants placed during the quarter (Items 16a plus 16b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
17. New Work-Based Learning Internship Subsidized (WBLI-SUB) participants placed during the quarter (Items 17a plus 17b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
18. New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
19. New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
20. New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
21. New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
22. New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
23. New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
24. New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
25. New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0
26. New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b)	0	0	0	0
a. ABAWD placements	0	0	0	0
b. Non-ABAWD placements	0	0	0	0

Figure 2.1.2.10 – STAT 47 Summary Sheet PART C After Changes

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

PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (E&T Counties Only) Count each participant in each applicable month each quarter.		Month 1 (A)		Month 2 (B)		Month 3 (C)		Quarter Total (D)
15. Job search participants by month during the quarter (Items 15a plus 15b)	145	26	146	24	147	19	148	69
a. ABAWD placements	149	16	150	13	151	11	152	40
b. Non-ABAWD placements	153	10	154	11	155	8	156	29
16. Job club participants by month during the quarter (Items 16a plus 16b)	157	0	158	0	159	0	160	0
a. ABAWD placements	161	0	162	0	163	0	164	0
b. Non-ABAWD placements	165	0	166	0	167	0	168	0
17. Workfare participants by month during the quarter (Items 17a plus 17b)	169	50	170	45	171	41	172	136
a. ABAWD placements	173	28	174	24	175	22	176	74
b. Non-ABAWD placements	177	22	178	21	179	19	180	62
18. Self-initiated workfare participants by month during the quarter (Items 18a plus 18b)	181	0	182	0	183	0	184	0
a. ABAWD placements	185	0	186	0	187	0	188	0
b. Non-ABAWD placements	189	0	190	0	191	0	192	0
19. Work experience (OJT) participants by month during the quarter (Items 19a plus 19b)	193	0	194	0	195	0	196	0
a. ABAWD placements	197	0	198	0	199	0	200	0
b. Non-ABAWD placements	201	0	202	0	203	0	204	0
20. Vocational training participants by month during the quarter (Items 20a plus 20b)	205	0	206	0	207	0	208	0
a. ABAWD placements	209	0	210	0	211	0	212	0
b. Non-ABAWD placements	213	0	214	0	215	0	216	0
21. Education participants by month during the quarter (Items 21a plus 21b)	217	0	218	0	219	0	220	0
a. ABAWD placements	221	0	222	0	223	0	224	0
b. Non-ABAWD placements	225	0	226	0	227	0	228	0
22. Job retention participants by month during the quarter (Items 22a plus 22b)	229	1	230	1	231	1	232	3
a. ABAWD placements	233	0	234	1	235	1	236	2
b. Non-ABAWD placements	237	1	238	0	239	0	240	1
23. Participants in other components offered by the county by month during the quarter (Items 23a plus 23b)	241	0	242	0	243	0	244	0
a. ABAWD placements (List components in Item 23a/23b explanation box)	245	0	246	0	247	0	248	0
b. Non-ABAWD placements (List components in Item 23a/23b explanation box)	249	0	250	0	251	0	252	0

Figure 2.1.2.11 – STAT 47 Summary Sheet PART D Before Changes

PART D. NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.		Month 1 (A)		Month 2 (B)		Month 3 (C)		Quarter Total (D)
27. Supervised Job Search (SJS) participants by month during the quarter (Items 27a plus 27b plus 27c)	293	0	294	0	295	0	296	0
a. ABAWD in qualifying component placements (WIOA and Veterans Programs)	297	0	298	0	299	0	300	0
b. Non-ABAWD placements	301	0	302	0	303	0	304	0
c. ABAWD in non-qualifying component placements	305	0	306	0	307	0	308	0
28. Workfare (W) participants by month during the quarter (Items 28a plus 28b)	309	0	310	0	311	0	312	0
a. ABAWD placements	313	0	314	0	315	0	316	0
b. Non-ABAWD placements	317	0	318	0	319	0	320	0
29. Self-Employment Training (SET) participants by month during the quarter (Items 29a plus 29b)	321	0	322	0	323	0	324	0
a. ABAWD placements	325	0	326	0	327	0	328	0
b. Non-ABAWD placements	329	0	330	0	331	0	332	0
30. Job Retention (JR) participants by month during the quarter (Items 30a plus 30b)	333	0	334	0	335	0	336	0
a. ABAWD placements	337	0	338	0	339	0	340	0
b. Non-ABAWD placements	341	0	342	0	343	0	344	0
Education Components								
31. Education Program Basic (EPB) participants placed by month during the quarter (includes ABE, HSD and GED) (Items 31a plus 31b)	345	0	346	0	347	0	348	0
a. ABAWD placements	349	0	350	0	351	0	352	0
b. Non-ABAWD placements	353	0	354	0	355	0	356	0
32. Education Program Career (EPC) participants by month during the quarter (includes CTE and Vocational training) (Items 32a plus 32b)	357	0	358	0	359	0	360	0
a. ABAWD placements	361	0	362	0	363	0	364	0
b. Non-ABAWD placements	365	0	366	0	367	0	368	0
33. Education Program English Language (EPEL) participants by month during the quarter (includes ESL and ELL) (Items 33a plus 33b)	369	0	370	0	371	0	372	0
a. ABAWD placements	373	0	374	0	375	0	376	0
b. Non-ABAWD placements	377	0	378	0	379	0	380	0
34. Education Program Integrated (EPI) participants by month during the quarter (includes Bridge Programs) (Items 34a plus 34b)	381	0	382	0	383	0	384	0
a. ABAWD placements	385	0	386	0	387	0	388	0
b. Non-ABAWD placements	389	0	390	0	391	0	392	0
35. Education Program Work Readiness Training (EPWRT) participants by month during the quarter (Items 35a plus 35b)	393	0	394	0	395	0	396	0
a. ABAWD placements	397	0	398	0	399	0	400	0
b. Non-ABAWD placements	401	0	402	0	403	0	404	0

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

Figure 2.1.2.12 – STAT 47 Summary Sheet PART D After Changes

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

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

Figure 2.1.2.13 – STAT 47 Summary Sheet PART E Before Changes

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

Figure 2.1.2.14 – STAT 47 Summary Sheet PART E After Changes

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

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

Figure 2.1.2.15 – STAT 47 Summary Sheet PART F Before Changes

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

Figure 2.1.2.16 – STAT 47 Summary Sheet PART F After Changes

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

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

Figure 2.1.2.17 – STAT 47 Summary Sheet Comment Section Before Changes

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

Figure 2.1.2.18 – STAT 47 Summary Sheet Comment Section After Changes

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

CalSAWS **STAT 47**

San Bernardino
Run Date: OCT-02-23 09:10 PM
Quarter: Jul. - Sep.
PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 ABAWDs exempt under the 15% criteria during the quarter

Part A totals:	Month 1	Month 2	Month 3	Total	
Line 3 – ABAWDs	0	0	0	0	Total

					Work Registration		
Month	ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type
-	-	-	-	-	-	-	-

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

CalSAWS **STAT 47**

San Bernardino
Run Date: JAN-28-24 05:01 PM
Quarter: Oct. - Dec.
PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 Total number of discretionary exemptions used during the quarter

Part A totals:	Month 1	Month 2	Month 3	Total	
Line 3 – ABAWDs	0	0	0	0	Total

					Work Registration		
Month	ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type
-	-	-	-	-	-	-	-

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

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

CalSAWS **STAT 47**

San Bernardino
Run Date: OCT-02-23 09:10 PM
Quarter: Jul. - Sep.
PART B. NEW INDIVIDUAL E&T PARTICIPANTS

PART B Totals	Month 1	Month 2	Month 3	Total
ABAWDs	15	0	0	15
Non-ABAWDs	13	5	1	19
Total	28	5	1	34

Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.21 – STAT 47 PART B Sheet Before Changes

CalSAWS **STAT 47**

San Bernardino
Run Date: JAN-28-24 05:01 PM
Quarter: Oct. - Dec.
PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS

PART B Totals	Month 1	Month 2	Month 3	Total
ABAWDs	1	0	0	1
Non-ABAWDs	1	0	0	1
Total	2	0	0	2

Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.22 – STAT 47 PART B Sheet After Changes

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

CalSAWS **STAT 47**

San Bernardino
Run Date: OCT-02-23 09:10 PM
Quarter: Jul. - Sep.
PART C. NEW E&T COMPONENT PLACEMENTS

PART C Totals	Month 1	Month 2	Month 3	Total
ABAWDs	15	0	0	15
Non-ABAWDs	13	6	1	20
Total	28	6	1	35

Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.23 – STAT 47 PART C Sheet Before Changes

CalSAWS **STAT 47**

San Bernardino
Run Date: JAN-28-24 05:01 PM
Quarter: Oct. - Dec.
PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS

PART C Totals	Month 1	Month 2	Month 3	Total
ABAWDs	1	0	0	1
Non-ABAWDs	1	0	0	1
Total	2	0	0	2

Line	Activity	Month	ABAWD	Case Number	Case Name

Figure 2.1.2.24 – STAT 47 PART C Sheet After Changes

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

2.1.3 Description of Change

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

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

ii. Title after: 'CalFresh Work Registrants, Able-Bodied Adults Without Dependents (ABAWD), and Employment and Training (E&T) Program Quarterly Statistical Report STAT 47'

b. Rename item 3 in 'PART A: WORK REGISTRANT AND ABAWD INFORMATION (All Counties)'
   i. Item 3 before: 'ABAWDs exempt under the 15% criteria during the quarter'
   ii. Item 3 after: 'Total number of discretionary exemptions used during the quarter'
c. Rename the PART B. title
   i. Title before: 'PART B: NEW INDIVIDUAL E&T PARTICIPANTS (E&T Counties Only) Count each participant in only one month during FFY.'
   ii. Title after: 'PART B: NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in only one month during FFY.'
d. Rename item 4 in 'PART B: NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only)'
   i. Item 4 before: 'New individuals who participated in E&T during the quarter (Items 4a plus 4b)'
   ii. Item 4 after: 'New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter (Items 4a plus 4b)'
e. Rename the PART C. title
   i. Title before: 'PART C: NEW E&T COMPONENT PLACEMENTS (E&T Counties Only) For each component placement, count the participants in only one month during FFY.'
   ii. Title after: 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.'
f. Rename item 7 in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only)'
   i. Item 7 before: 'New workfare participants placed during the quarter (Items 7a plus 7b)'
   ii. Item 7 after: 'New Workfare (W) participants placed during the quarter (Items 7a plus 7b)'
g. Rename item 12 and change its item number to item 9 in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only)'
   i. Item 12 before: 'New job retention participants placed during the quarter (Items 12a plus 12 b)'
   ii. Item 9 after: 'New Job Retention (JR) participants placed during the quarter (Items 9a plus 9b)'

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

2. Item b: Non-ABAWD placements
3. Item c: ABAWD in non-qualifying component placements

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

2. Item b: Non-ABAWD placements

xiv. Item 18: New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xv. Item 19: New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xvi. Item 20: New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xvii. Item 21: New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xviii. Item 22: New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xix. Item 23: New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xx. Item 24: New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xxi. Item 25: New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

xxii. Item 26: New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

j. Rename the PART D. title

i. Title before: 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (E&T Counties Only) Count each participant in each applicable month each quarter.'
ii. Title after: PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'

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

2. Item b: Non-ABAWD placements

vi. Item 21: Education participants by month during the quarter (Items 21a plus 21b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements
vii. Item 23: Participants in other components offered by the county by month during the quarter (Items 23a plus 23b)
    1. Item a: ABAWD placements (List components in Item 23a/23b explanation box)
    2. Item b: Non-ABAWD placements (List components in Item 23a/23b explanation box)

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

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

xviii. Item 44: Work-Based Learning Transitional Jobs (WBLTJ) participants by month during the quarter (Items 44a plus 44b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements
xix. Item 45: Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants by month during the quarter (Items 45a plus 45b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements
xx. Item 46: Work-Based Learning Other (WBLO) participants by month during the quarter (Items 46a plus 46b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements
xxi. Item 47: Work-Based Learning Other Subsidized (WBLO-SUB) participants by month during the quarter (Items 47a plus 47b)
    1. Item a: ABAWD placements
    2. Item b: Non-ABAWD placements

o. Rename item 24 and change its item number to item 48 in 'PART E. E&T TOTALS FOR THE FNS 583'
    i. Item 24 before: 'ABAWDs that participated in a qualifying E&T component by month during the quarter (Sum of Items 17a through 23a)'
    ii. Item 48 after: 'ABAWDs that participated in a qualifying CalFresh E&T component by month during the quarter (Sum of Items 27a through 47a)'
p. Rename item 25 and change its item number to item 49 in 'PART E. E&T TOTALS FOR THE FNS 583'
    i. Item 25 before: 'ABAWDs that participated in a non-qualifying E&T component by month during the quarter (Sum of Items 15a through 16a)'
    ii. Item 49 after: 'ABAWDs that participated in a non-qualifying CalFresh E&T component by month during the quarter (Count of Item 27c)'
q. Remove the following items in 'PART E. E&T TOTALS FOR THE FNS 583'
    i. Item 26: Non-ABAWDs that participated in an E&T component by month during the quarter (Sum of Items 15b plus 23b)
    ii. Item 27: 'E&T participants who are not ABAWDs in qualifying components by month during the quarter (Items 25 plus 26)
r. Add the following item in 'PART E. E&T TOTALS FOR THE FNS 583'
    i. Item 50: 'CalFresh E&T participants who are not ABAWDs in a component by month during the quarter (Sum of Items 27b through 47b plus the count of item 49)'
s. Rename the PART F. title

i. Title before: 'PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS (All Counties) The review period for Items 28 and 29 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.'
ii. Title after: 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS The review period for Items 51, 52 and 53 is October 1. Complete when submitting the Oct-Dec quarter. Leave blank during the Jan-Mar, Apr-Jun and Jul-Sep quarters.'

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

1. Sheet title before: 'PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 ABAWDs exempt under the 15% criteria during the quarter'
2. Sheet title after: 'PART A. WORK REGISTRANT AND ABAWD INFORMATION - Line 3 Total number of discretionary exemptions used during the quarter'

ii. Part B
1. Sheet title before: 'PART B. NEW INDIVIDUAL E&T PARTICIPANTS'
2. Sheet title after: 'PART B. NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS'

iii. Part C
1. Sheet title before: 'PART C. NEW E&T COMPONENT PLACEMENTS'
2. Sheet title after: 'PART C. NEW CALFRESH E&T COMPONENT PLACEMENTS'

2. Update the STAT 47 state report logic to remove the restriction to those individuals that are Non-Assistance CalFresh (NACF) only.
   a. The entire report logic will remove the condition that filters for Non-Assistance CalFresh (NACF) individuals only.
   b. The base population will now count all CalFresh individuals regardless if they are Non-Assistance CalFresh (NACF) or Public-Assistance (PACF).

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

   - AC.PUBLIC_ASSIST_IND = 'N'
     - This is looking at the PUBLIC_ASSIST_IND from the AID_CODE table.
   - NA_PA = 'NA'
     - NA_PA is a manually created column in the logic used to distinguish those who are CalFresh without CalWORKs individuals (NACF) versus those who are CalFresh with CalWORKs individuals (PACF).

3. Update the STAT 47 state report logic to account for the removal of current CalFresh E&T components and addition of new CalFresh E&T components per ACL 22-67 and ACL 22-67E. The mapping of customer components/activities for the CFET and GROW programs will be updated in respect to SCRs CA-230837 (CFET components) and CA-254559 (GROW activities).
   a. CFET components which are to be removed and no longer countable on the STAT 47
      i. Education
      ii. Job Club
      iii. Job Search
      iv. Self-Initiated Workfare
      v. Vocational Training
      vi. Work Experience

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

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

xii. Pathways to Success
xiii. Security Office Training
xiv. Self-Initiated Program
xv. Short-Term Training

f. New GROW activities to be mapped to a CFET component on the STAT 47
Note: These new GROW activities will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.
i. Activity #1 - EDU
ii. Activity #2 - EDU
iii. Activity #3 - EDU
iv. Activity #4- WEP
v. Activity #5- WEP
vi. Activity #6- WEP
vii. Activity #7-WEP
viii. Activity #8-SJS
ix. Activity #9-SJS
x. Activity #10- SET
xi. Apprenticeship
xii. Assessment
xiii. Career Exploration Month #1
xiv. Career Exploration Month #2
xv. Career Exploration Month #3
xvi. Careers for a Cause (C4C)
xvii. CFET Retention Services
xviii. Community College
xix. Entrepreneurship
xx. Financial Literacy
xxi. GROW Transition-Age Youth Employment Program (GTEP)
xxii. GROW Youth Employment Program (GYEP)
xxiii. License/Certificate/Exam (LCE)
xxiv. Life Skills
xxv. Ready, Set, START!
xxvi. RightWay
~~xxvii. START Connect~~
xxviii. START Learning
xxix. START ORIENTATION
xxx. Subsidized Employment
xxxi. TAYPortunity Program
xxxii. TAYPortunity Transitional Subsidized Employment
xxxiii. Unsubsidized Employment
xxxiv. Vocational Assessment
xxxv. Workfare

g. Logic updates to items in 'PART B: NEW INDIVIDUAL CALFRESH E&T PARTICIPANTS (CalFresh E&T Counties Only)'

i. Item 4 'New individuals who participated in a CalFresh E&T activity, including orientation/assessment during the quarter'

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

1. Remove the following CFET components/activities from being counted in the population for item 4
    a. Education
    b. Job Club
    c. Job Search
    d. Self-Initiated Workfare
    e. Vocational Training
    f. Work Experience
2. Add the following CFET components/activities to be counted in the population for item 4
    a. EDU Prog. Basic (EPB)
    b. EDU Prog. Career (EPC)
    c. EDU Prog. English Language (EPEL)
    d. EDU Prog. Integrated (EPI)
    e. EDU Prog. Work Readiness Training (EPWRT)
    f. Orientation/Assessment (OA)
    g. Self-Employment Training (SET)
    h. Supv. Job Search (Non-Qualifying)
    i. Supv. Job Search (WIOA and Veterans)
    j. Work Activity (WA)
    k. WBL Internship (WBLI)
    l. WBL Internship Subs. (WBLI-SUB)
    m. WBL On-the-Job Training (WBLOJT)
    n. WBL Other (WBLO)
    o. WBL Other Subs. (WBLO-SUB)
    p. WBL Pre-apprenticeship (WBLPA)
    q. WBL Pre-apprenticeship Subs. (WBLPA-SUB)
    r. WBL Apprenticeship (WBLA)
    s. WBL Apprenticeship Subs. (WBLA-SUB)
    t. WBL Transitional Jobs (WBLTJ)
    u. WBL Transitional Jobs Subs. (WBLTJ-SUB)
3. The following CFET components/activities will remain as countable in the population for item 4
    a. Job Retention
    b. Workfare
4. Remove the following GROW activities from being counted in the population for item 4
    a. Non-Custodial Parent
    b. Post Employment Services
    c. Youth
5. The following GROW activities will remain as countable in the population for item 4

a. Career Opportunities Resources & Employment
b. Computer Application Class
c. Education & Training
d. GED
e. Intensive Case Management
f. Job Fair
g. Job Readiness Training
h. Job Readiness Training for Youth
i. Literacy
j. Office Occupations
k. One-Stop
l. Pathways to Success
m. Security Office Training
n. Self-Initiated Program
o. Short-Term Training

6. Add the following GROW activities to be counted in the population for item 4
Note: These new GROW activities will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.
a. Activity #1 - EDU
b. Activity #2 - EDU
c. Activity #3 - EDU
d. Activity #4- WEP
e. Activity #5- WEP
f. Activity #6- WEP
g. Activity #7-WEP
h. Activity #8-SJS
i. Activity #9-SJS
j. Activity #10- SET
k. Apprenticeship
l. Assessment
m. Career Exploration Month #1
n. Career Exploration Month #2
o. Career Exploration Month #3
p. Careers for a Cause (C4C)
q. CFET Retention Services
r. Community College
s. Entrepreneurship
t. Financial Literacy
u. GROW Transition-Age Youth Employment Program (GTEP)
v. GROW Youth Employment Program (GYEP)
w. License/Certificate/Exam (LCE)
x. Life Skills
y. Ready, Set, START!

z. RightWay
aa. START Learning
bb. START ORIENTATION
cc. Subsidized Employment
dd. TAYPortunity Program
ee. TAYPortunity Transitional Subsidized Employment
ff. Unsubsidized Employment
gg. Vocational Assessment
hh. Workfare

h. Logic updates to items in 'PART C: NEW CALFRESH E&T COMPONENT PLACEMENTS (CalFresh E&T Counties Only) For each component placement, count the participants in only one month during FFY.' and 'PART D: NEW AND CONTINUING PROGRAM PARTICIPANTS (CalFresh E&T Counties Only) Count each participant in each applicable month each quarter.'

Note:

- The PART C and PART D existing base logic will remain in place, what is changing in these sections is the components/activities that are counted in the base population.
- See section **5.1 Component/Activity to CFET Component Mapping** in the **Appendix** for the complete mapping of components/activities to CFET Components.
- **Bolded** activities indicate a **GROW activity.**
  Note: New GROW activities added under CA-254559 will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail and list of affected GROW activities.

i. Item 5 'New Orientation/Assessment (OA) participants placed during the quarter (Items 5a plus 5b)'
   1. (5a) This population will count new ABAWD participants with a component/activity type of 'Orientation/Assessment (OA)', **'START ORIENTATION'** or **'Assessment'**
   2. (5b) This population will count new non-ABAWD participants with a component/activity type of 'Orientation/Assessment (OA)', **'START ORIENTATION'** or **'Assessment'**
   3. Items 5a plus 5b will sum up to item 5

ii. Item 6 'New Supervised Job Search (SJS) participants placed during the quarter (Items 6a plus 6b plus 6c)' and Item 27 'Supervised Job Search (SJS) participants by month during the quarter (Items 27a plus 27b plus 27c)'

1. (a) 'ABAWD in qualifying component placements (WIOA and Veterans Programs)'
    a. This population will count ABAWD participants with a component/activity type of 'Supv. Job Search (WIOA and Veterans)' or **'One-Stop'**
2. (b) 'Non-ABAWD placements'
    a. This population will count Non-ABAWD participants with a component/activity type of 'Supv. Job Search (Non-Qualifying)', **'One-Stop', 'Activity #8-SJS', 'Activity #9-SJS', 'Career Exploration Month #1', 'Career Exploration Month #2', 'Career Exploration Month #3', 'Career Opportunities Resources & Employment', 'Intensive Case Management', 'Job Fair', 'Job Readiness Training', 'Job Readiness Training for Youth', 'Pathways to Success',** or **'RightWay'**
3. (c) 'ABAWD in non-qualifying component placements'
    a. This population will count ABAWD participants with a component/activity type of 'Supv. Job Search (Non-Qualifying)', **'Activity #8-SJS', 'Activity #9-SJS', 'Career Exploration Month #1', 'Career Exploration Month #2', 'Career Exploration Month #3', 'Career Opportunities Resources & Employment', 'Intensive Case Management', 'Job Fair', 'Job Readiness Training', 'Job Readiness Training for Youth', 'Pathways to Success',** or **'RightWay'**
4. Items 6a plus 6b plus 6c will sum up to item 6 and items 27a plus 27b plus 27c will sum up to item 27

iii. Item 7 'New Workfare (W) participants placed during the quarter (Items 7a plus 7b)' and Item 28 'Workfare (W) participants by month during the quarter (Items 28a plus 28b)'

1. (a) These items will continue to count ABAWD participants with the existing component/activity type of 'Workfare'
2. (b) These items will continue to count non-ABAWD participants with the existing component/activity type of 'Workfare'
3. Items 7a plus 7b will sum up to item 7 and items 28a and 28b will sum up to item 28.
4. The Workfare component/activity will belong to both the GROW and CFET service categories on

the 'Select Activity' page and will be distinguished by the program the component/activity is assigned under, CFET or GROW. In the scenario the customer has a Workfare component/activity for both CFET and GROW, the report will pick the latest component/activity the customer was placed in for the quarter. This will prevent double counting the Workfare component/activity for both the CFET and GROW programs.
Tech Note: The latest Workfare component/activity will be chosen by taking the activity with the most recent Begin Date (CUST_ACTIV.BEG_DATE)

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

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

vi. Item 10 'New Education Program Basic (EPB) participants placed during the quarter (includes ABE, HSD and GED) (Items 10a plus 10b)' and Item 31 'Education Program Basic (EPB) participants by month during the quarter (includes ABE, HSD and GED) (Items 31a plus 31b)'

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

1. (a) These populations will count ABAWD participants with a component/activity type of 'EDU Prog. Basic (EPB)', **'Financial Literacy', 'Ready, Set, START!', 'Life Skills'** or **'Literacy'**
2. (b) These populations will count non-ABAWD participants with a component/activity type of 'EDU Prog. Basic (EPB)', **'Financial Literacy', 'Ready, Set, START!', 'Life Skills'** or **'Literacy'**
3. Items 10a plus 10b will sum up to item 10 and items 31a and 31b will sum up to item 31.

vii. Item 11 'New Education Program Career (EPC) participants placed during the quarter (includes CTE and Vocational training) (Items 11a plus 11b)' and Item 32 'Education Program Career (EPC) participants by month during the quarter (includes CTE and Vocational training) (Items 32a plus 32b)'

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

1. (a) These populations will count ABAWD participants with a component/activity type of 'EDU Prog. Career (EPC)', **'Activity #1 – EDU', 'Activity #2 – EDU', 'Activity #3 – EDU', 'Careers for a Cause (C4C)', 'Community College', 'License/Certificate/Exam (LCE)', 'Computer Application Class', 'GED', 'Office Occupations', 'Security Officer Training', 'Self-Initiated Program', 'Short-Term Training',** or **'Vocational Assessment'**
2. (b) These populations will count non-ABAWD participants with a component/activity type of 'EDU Prog. Career (EPC)', **'Activity #1 – EDU', 'Activity #2 – EDU', 'Activity #3 – EDU', 'Careers for a Cause (C4C)', 'Community College', 'License/Certificate/Exam (LCE)', 'Computer Application Class', 'GED', 'Office Occupations', 'Security Officer Training', 'Self-Initiated Program', 'Short-Term Training',** or **'Vocational Assessment'**
3. Items 11a and 11b will sum up to item 11 and items 32a and 32b will sum up to item 32.

viii. Item 12 'New Education Program English Language (EPEL) participants placed during the quarter (includes ESL and ELL) (Items 12a plus 12b)' and Item 33 'Education Program English Language (EPEL) participants by month

during the quarter (includes ESL and ELL) (Items 33a plus 33b)'

Note: User should select the 'EDU Prog. English Language (EPEL)' component if the participant is in ESL and ELL, in order to be counted towards the Education Program English Language (EPEL) CFET component on the STAT 47.

1. (a) These populations will count ABAWD participants with a component type of 'EDU Prog. English Language (EPEL)'
2. (b) These populations will count non-ABAWD participants with a component type of 'EDU Prog. English Language (EPEL)'
3. Items 12a plus 12b will sum up to item 12 and items 33a and 33b will sum up to item 33.

ix. Item 13 'New Education Program Integrated (EPI) participants placed during the quarter (includes Bridge Programs) (Items 13a plus 13b)' and Item 34 'Education Program Integrated (EPI) participants by month during the quarter (includes Bridge Programs) (Items 34a plus 34b)'

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

1. (a) These populations will count ABAWD participants with a component type of 'EDU Prog. Integrated (EPI)'
2. (b) These populations will count non-ABAWD participants with a component type of 'EDU Prog. Integrated (EPI)'
3. Items 13a plus 13b will sum up to item 13 and items 34a and 34b will sum up to item 34.

x. Item 14 'New Education Program Work Readiness Training (EPWRT) participants placed during the quarter (Items 14a plus 14b)' and Item 35 'Education Program Work Readiness Training (EPWRT) participants by month during the quarter (Items 35a plus 35b)'

1. (a) These populations will count ABAWD participants with a component/activity type of 'EDU Prog. Work Readiness Training (EPWRT)', **'START Learning'**, **'RightWay'** or **'Education & Training'**
2. (b) These populations will count non-ABAWD participants with a component/activity type of 'EDU Prog. Work Readiness Training (EPWRT)', **'START Learning'**, **'RightWay'** or **'Education & Training'**

3. Items 14a plus 14b will sum up to item 14 and items 35a and 35b will sum up to item 35.

xi. Item 15 'New Work Activity (WA) participants placed during the quarter (Items 15a plus 15b)' and Item 36 'Work Activity (WA) participants by month during the quarter (Items 36a plus 36b)'
    1. (a) These populations will count ABAWD participants with a component type of 'Work Activity (WA)'
    2. (b) These populations will count non-ABAWD participants with a component type of 'Work Activity (WA)'
    3. Items 15a plus 15b will sum up to item 15 and items 36a plus 36b will sum up to item 36.

xii. Item 16 'New Work-Based Learning Internship (WBLI) participants placed during the quarter (Items 16a plus 16b)' and Item 37 'Work-Based Learning Internship (WBLI) participants by month during the quarter (Items 37a plus 37b)'
    1. (a) These populations will count ABAWD participants with a component type of 'WBL Internship (WBLI)'
    2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Internship (WBLI)'
    3. Items 16a plus 16b will sum up to item 16 and items 37a and 37b will sum up to item 37.

xiii. Item 17 'New Work-Based Learning Internship Subsidized (WBLI-SUB) participants placed during the quarter (Items 17a plus 17b)' and Item 38 'Work-Based Learning Internship Subsidized (WBLI-SUB) participants by month during the quarter (Items 38a plus 38b)'
    1. (a) These populations will count ABAWD participants with a component type of 'WBL Internship Subs. (WBLI-SUB)'
    2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Internship Subs. (WBLI-SUB)'
    3. Items 17a plus 17b will sum up to item 17 and items 38a plus 38b will sum up to item 38.

xiv. Item 18 'New Work-Based Learning On-the-Job Training (WBLOJT) participants placed during the quarter (Items 18a plus 18b)' and Item 39 'Work-Based Learning On-the-Job Training (WBLOJT) participants by month during the quarter (Items 39a plus 39b)'
    1. (a) These populations will count ABAWD participants with a component type of 'WBL On-the-Job Training (WBLOJT)'

2. (b) These populations will count non-ABAWD participants with a component type of 'WBL On-the-Job Training (WBLOJT)'
3. Items 18a plus 18b will sum up to item 18 and items 39a plus 39b will sum up to item 39.

xv. Item 19 'New Work-Based Learning Pre-apprenticeship (WBLPA) participants placed during the quarter (Items 19a plus 19b)' and Item 40 'Work-Based Learning Pre-apprenticeship (WBLPA) participants by month during the quarter (Items 40a plus 40b)'
1. (a) These populations will count ABAWD participants with a component type of 'WBL Pre-apprenticeship (WBLPA)'
2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Pre-apprenticeship (WBLPA)'
3. Items 19a plus 19b will sum up to item 19 and items 40a plus 40b will sum up to item 40.

xvi. Item 20 'New Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants placed during the quarter (Items 20a plus 20b)' and Item 41 'Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB) participants by month during the quarter (Items 41a plus 41b)'
1. (a) These populations will count ABAWD participants with a component type of 'WBL Pre-apprenticeship Subs. (WBLPA-SUB)'
2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Pre-apprenticeship Subs. (WBLPA-SUB)'
3. Items 20a plus 20b will sum up to item 20 and items 41a and 41b will sum up to item 41.

xvii. Item 21 'New Work-Based Learning Apprenticeship (WBLA) participants placed during the quarter (Items 21a plus 21b)' and Item 42 'Work-Based Learning Apprenticeship (WBLA) participants by month during the quarter (Items 42a plus 42b)'
1. (a) These populations will count ABAWD participants with a component type of 'WBL Apprenticeship (WBLA)'
2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Apprenticeship (WBLA)'
3. Items 21a plus 21b will sum up to item 21 and items 42a and 42b will sum up to item 42.

xviii. Item 22 'New Work-Based Learning Apprenticeship Subsidized (WBLA-SUB) participants placed during the quarter (Items 22a plus 22b)' and Item 43 'Work-Based

Learning Apprenticeship Subsidized (WBLA-SUB) participants by month during the quarter (Items 43a plus 43b)'

1. (a) These populations will count ABAWD participants with a component/activity type of 'WBL Apprenticeship Subs. (WBLA-SUB)', or **'Apprenticeship'**
2. (b) These populations will count non-ABAWD participants with a component/activity type of 'WBL Apprenticeship Subs. (WBLA-SUB)', or **'Apprenticeship'**
3. Items 22a plus 22b will sum up to item 22 and items 43a plus 43b will sum up to item 43.

xix. Item 23 'New Work-Based Learning Transitional Jobs (WBLTJ) participants placed during the quarter (Items 23a plus 23b)' and Item 44 'Work-Based Learning Transitional Jobs (WBLTJ) participants by month during the quarter (Items 44a plus 44b)'

1. (a) These populations will count ABAWD participants with a component/activity type of 'WBL Transitional Jobs (WBLTJ)', or **'Unsubsidized Employment'**
2. (b) These populations will count non-ABAWD participants with a component/activity type of 'WBL Transitional Jobs (WBLTJ)', or **'Unsubsidized Employment'**
3. Items 23a plus 23b will sum up to item 23 and items 44a plus 44b will sum up to item 44.

xx. Item 24 'New Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants placed during the quarter (Items 24a plus 24b)' and Item 45 'Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB) participants by month during the quarter (Items 45a plus 45b)'

1. (a) These populations will count ABAWD participants with a component/activity type of 'WBL Transitional Jobs Subs. (WBLTJ-SUB)', **'Activity #4- WEP', 'Activity #5- WEP', 'Activity #6- WEP', 'Activity #7-WEP', 'Subsidized Employment', 'TAYPortunity Program', 'TAYPortunity Transitional Subsidized Employment', 'GROW Transition-Age Youth Employment Program (GTEP)', 'GROW Youth Employment Program (GYEP)'**, or **'One-Stop'**
2. (b) These populations will count non-ABAWD participants with a component/activity type of 'WBL Transitional Jobs Subs. (WBLTJ-SUB)', **'Activity #4- WEP', 'Activity #5- WEP', 'Activity #6- WEP', 'Activity #7-WEP', 'Subsidized Employment',**

'TAYPortunity Program', 'TAYPortunity Transitional Subsidized Employment', 'GROW Transition-Age Youth Employment Program (GTEP)', 'GROW Youth Employment Program (GYEP)', or **'One-Stop'**

3. Items 24a plus 24b will sum up to item 24 and items 45a plus 45b will sum up to item 45.

xxi. Item 25 'New Work-Based Learning Other (WBLO) participants placed during the quarter (Items 25a plus 25b)' and Item 46 'Work-Based Learning Other (WBLO) participants by month during the quarter (Items 46a plus 46b)'

1. (a) These populations will count ABAWD participants with a component type of 'WBL Other (WBLO)'
2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Other (WBLO)'
3. Items 25a plus 25b will sum up to item 25 and items 46a plus 46b will sum up to item 46.

xxii. Item 26 'New Work-Based Learning Other Subsidized (WBLO-SUB) participants placed during the quarter (Items 26a plus 26b)' and Item 47 'Work-Based Learning Other Subsidized (WBLO-SUB) participants by month during the quarter (Items 47a plus 47b)'

1. (a) These populations will count ABAWD participants with a component type of 'WBL Other Subs. (WBLO-SUB)'
2. (b) These populations will count non-ABAWD participants with a component type of 'WBL Other Subs. (WBLO-SUB)'
3. Items 26a plus 26b will sum up to item 26 and items 47a plus 47b will sum up to item 47.

i. Update detail sheets 'Part C' and 'Part D' 'Line' column mapping to account for the removal and addition of CFET components

i. See change **2.1.3.2.e** for the component/activities mapped to each item number. The item number will provide the 'Line' column value which is to be displayed for the respective component/activity.

1. Using change **2.1.3.2.e.iv** as an example, possible 'Line' column values for component/activities 'Self-Employment Training (SET)', 'Activity #10- SET', or 'Entrepreneurship' would be 'Line 8a' or 'Line 8b' on the 'Part C' detail sheet, or 'Line 29a' or 'Line 29b' on the 'Part D' detail sheet.

ii. For 'Part C' detail sheet, possible 'Line' column values will range from item 5a/b – 26a/b

iii. For 'Part D' detail sheet, possible 'Line' column values will range from item 27a/b – 47a/b

j. Update the population for detail sheets 'Part B', 'Part C' and 'Part D' to include those belonging to the updated CFET components

k. Update the logic for section 'PART E. E&T TOTALS FOR THE FNS 583' to account for the removal and addition of CFET components

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

i. Item 48 'ABAWDs that participated in a qualifying CalFresh E&T component by month during the quarter'
    1. These counts will be updated to take the sum of items 27a through 47a for the respective 'Month 1 (A)', 'Month 2 (B)', 'Month 3 (C)' and 'Quarter Total (D)' columns

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

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

iv. Item 26 on the prior STAT 47 report template has been removed but this population is captured in what is now item 50 'CalFresh E&T Participants who are not ABAWDs in a component by month during the quarter'

l. Update the logic for section 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, AND E&T PARTICIPANT COUNTS' to add new item 53

i. Item 53: 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only)'. This population will be the count of all CalFresh E&T participants in a CFET component carried forward to October 1 of the reporting period.
    1. This entails the participant is a work registrant as of 9/30 and is participating in a component/activity (those components/activities counted towards the CFET components in sections PART C and PART D) that is not ended before 10/01.

Tech Note:

For CFET activities:

- The begin date (CUST_ACTIV.BEG_DATE) of the latest component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.
- The latest activity status is Active: CUST_ACTIV_DETL.STAT_CODE = 'AC'
- The activity status reason is Attending: CUST_ACTIV_DETL.STAT_RSN_CODE = 'AT'
- The begin date (CUST_ACTIV_DETL.BEG_DATE) of the component/activity's status will have a begin date prior to Oct 1 and the end date (CUST_ACTIV_DETL.END_DATE) of the component/activity is greater than or equal to Oct 1.

For GROW activities:

- The begin date (CUST_ACTIV.BEG_DATE) of the latest component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.
- The latest activity status is Active: CUST_ACTIV_DETL.STAT_CODE = 'AC'
- The activity status reason is Attending or Processing: CUST_ACTIV_DETL.STAT_RSN_CODE in ('AT', 'PR')
- The begin date (CUST_ACTIV_DETL.BEG_DATE) of the component/activity's status will have a begin date prior to Oct 1 and the end date (CUST_ACTIV_DETL.END_DATE) of the component/activity is greater than or equal to Oct 1.

2. For CFET activities the participant must be in an Active or Ineligible CFET program as of 10/1

Tech Note:

- PGM.PGM_CODE = 'FT'
- PGM_DETL.STAT_CODE in ('AC, 'IN')

- The program will have a PGM_DETL.BEG_DATE prior to Oct 1 and the PGM_DETL.END_DATE of the program is greater than or equal to Oct 1
- PGM_PERS will need to be linked to the PGM_CUST_ACTIV table where PGM_PERS.ID = PGM_CUST_ACTIV.PGM_PERS_ID and CUST_ACTIV.ID = PGM_CUST_ACTIV.CUST_ACTIV_ID
    - PGM linkage will then be derived from PGM_PERS

3. For GROW activities the participant must be in an Active or Ineligible GROW program as of 10/1

   Tech Note:

   - PGM.PGM_CODE = 'GW'
   - PGM_DETL.STAT_CODE in ('AC, 'IN')
   - The program will have a PGM_DETL.BEG_DATE prior to Oct 1 and the PGM_DETL.END_DATE of the program is greater than or equal to Oct 1
   - PGM_PERS will need to be linked to the PGM_CUST_ACTIV table where PGM_PERS.ID = PGM_CUST_ACTIV.PGM_PERS_ID and CUST_ACTIV.ID = PGM_CUST_ACTIV.CUST_ACTIV_ID
       - PGM linkage will then be derived from PGM_PERS

4. The participant is an Active or Ineligible member in an Active or Ineligible CalFresh program as of 10/1

   Tech Note:

   - PGM.PGM_CODE = 'FS'
   - PGM_DETL.STAT_CODE in ('AC, 'IN')
   - Oct 1 will be between the PGM_DETL.BEG_DATE and the PGM_DETL.END_DATE of the program
   - PGM_PERS_DETL.STAT_CODE in ('AC, 'IN')
   - Oct 1 will be between the PGM_PERS_DETL.BEG_DATE and the PGM_PERS_DETL.END_DATE
   - PGM_PERS_DETL.ROLE_CODE = 'ME'

5. The participant is not an Active member or Ineligible on a CalWORKs program as of 10/1

   Tech Note:

   - PGM.PGM_CODE = 'CW'

- Oct 1 will be between the PGM_PERS_DETL.BEG_DATE and the PGM_PERS_DETL.END_DATE
- PGM_PERS_DETL.STAT_CODE = 'AC'
    a. And PGM_PERS_DETL.ROLE_CODE = 'ME'
    b. And PGM_PERS_DETL.CREATED_ON is prior to Oct 1

  OR PGM_PERS_DETL.STAT_CODE = 'IN'

6. No new individuals counted in sections PART A and PART B shall be counted in item 53 as carried forward and vice versa.
    - The STAT 47 and STAT 47 Part F Backup Report share the same PySpark report code for Part F information. The 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS' information shall reconcile between the STAT 47 and STAT 47 Part F Backup Report. The STAT 47 report currently takes the data generated in the STAT 47 Part F Backup Report to populate its 'PART F' section during the January report generation for the October quarter.

4. Correct the STAT 47 state report logic so that GROW activities appearing in PART B, PART C and PART D are only those activities that occur during the reporting quarter.

2.1.4 Report Location

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

2.1.5 Counties Impacted

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

2.1.6 Security Updates

1. Security Rights

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

2. Security Groups

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

2.1.7 Report Usage/Performance

No significant performance impact or report usage changes are expected.

2.2 STAT 47 Part F Backup Report

2.2.1 Overview

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

2.2.2 STAT 47 Part F Backup Report Mockup

CalSAWS **STAT 47 Part F Backup Report**

San Bernardino
Run Date: JAN-28-24 05:01 PM
Report Year: 2023/2024
PART F. POINT-IN-TIME WORK REGISTRANT AND ABAWD COUNTS

PART F Totals:	Total
Line 28. Work registrants on October 1	2
Line 29. ABAWDs on October 1	0

Total	2

				Work Registration			CalFresh		
ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type	Status	Begin Date	End Date
N	0014231	Case Name	Person Name	09/15/2022	Mandatory	CFWR	Active	09/01/2023	-
N	0106188	Case Name	Person Name	02/26/2018	Mandatory	CFWR	Active	11/01/2021	-

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

CalSAWS **STAT 47 Part F Backup Report**

San Bernardino

Run Date: JAN-28-24 05:01 PM

Report Year: 2023/2024

PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS

PART F Totals:	Total
Line 51. Work registrants on October 1	4
Line 52. ABAWDs on October 1	1
Line 53. CalFresh E&T Participants on October 1	3

Total	4

				Work Registration			CalFresh			Activity		
ABAWD	Case Number	Case Name	Person Name	Begin Date	Status	Type	Status	Begin Date	End Date	Type	Begin Date	End Date
N	0014231	Case Name	Person Name	09/15/2022	Mandatory	CFET	Active	09/01/2023	-	Job Retention	09/01/2023	10/01/2023
N	0106188	Case Name	Person Name	02/26/2018	Mandatory	CFET	Active	11/01/2021	-	Job Retention	09/01/2023	10/01/2023
N	0288258	Case Name	Person Name	04/01/2023	Mandatory	CFWR	Active	10/01/2023	-	-	-	-
Y	0305560	Case Name	Person Name	01/01/2023	Mandatory	CFET	Active	11/01/2021	-	Job Retention	09/01/2023	10/01/2023

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

2.2.3 Description of Change

1. Update the STAT 47 Part F Backup report to add new Totals information for new item 53 'CalFresh E&T Participants on October 1 (CalFresh E&T Counties Only)' being added to the STAT 47.

~~The Part F population will automatically include those that are CalFresh E&T participants on October 1 of the reporting period as this is a subset of item 51 'Work registrants on October 1'~~

   a. This population is the count of all CalFresh E&T participants in a CFET component carried forward to October 1 of the reporting period.

      i. This entails the participant is a work registrant as of 9/30 and is participating in a component/activity (those components/activities counted towards the CFET components in sections PART C and PART D) that is not ended before 10/01.

Tech Note:

For CFET activities:

- The begin date (CUST_ACTIV.BEG_DATE) of the latest component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.
- The latest activity status is Active: CUST_ACTIV_DETL.STAT_CODE = 'AC'
- The activity status reason is Attending: CUST_ACTIV_DETL.STAT_RSN_CODE = 'AT'

- The begin date (CUST_ACTIV_DETL.BEG_DATE) of the component/activity's status will have a begin date prior to Oct 1 and the end date (CUST_ACTIV_DETL.END_DATE) of the component/activity is greater than or equal to Oct 1.

For GROW activities:

- The begin date (CUST_ACTIV.BEG_DATE) of the latest component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.
- The latest activity status is Active: CUST_ACTIVE_DETL.STAT_CODE = 'AC'
- The activity status reason is Attending or Processing: CUST_ACTIVE_DETL.STAT_RSN_CODE in ('AT', 'PR')
- The begin date (CUST_ACTIV_DETL.BEG_DATE) of the component/activity's status will have a begin date prior to Oct 1 and the end date (CUST_ACTIV_DETL.END_DATE) of the component/activity is greater than or equal to Oct 1.

ii. For CFET activities the participant must be in an Active or Ineligible CFET program as of 10/1

Tech Note:

- PGM.PGM_CODE = 'FT'
- PGM_DETL.STAT_CODE in ('AC, 'IN')
- The program will have a PGM_DETL.BEG_DATE prior to Oct 1 and the PGM_DETL.END_DATE of the program is greater than or equal to Oct 1
- PGM_PERS will need to be linked to the PGM_CUST_ACTIV table where PGM_PERS.ID = PGM_CUST_ACTIV.PGM_PERS_ID and CUST_ACTIV.ID = PGM_CUST_ACTIV.CUST_ACTIV_ID
    - PGM linkage will then be derived from PGM_PERS

iii. For GROW activities the participant must be in an Active or Ineligible GROW program as of 10/1

Tech Note:

- PGM.PGM_CODE = 'GW'
- PGM_DETL.STAT_CODE in ('AC, 'IN')

- The program will have a PGM_DETL.BEG_DATE prior to Oct 1 and the PGM_DETL.END_DATE of the program is greater than or equal to Oct 1
- PGM_PERS will need to be linked to the PGM_CUST_ACTIV table where PGM_PERS.ID = PGM_CUST_ACTIV.PGM_PERS_ID and CUST_ACTIV.ID = PGM_CUST_ACTIV.CUST_ACTIV_ID
    - PGM linkage will then be derived from PGM_PERS

iv. The participant is an Active or Ineligible member in an Active or Ineligible CalFresh program as of 10/1

Tech Note:

- PGM.PGM_CODE = 'FS'
- PGM_DETL.STAT_CODE in ('AC, 'IN')
- Oct 1 will be between the PGM_DETL.BEG_DATE and the PGM_DETL.END_DATE of the program
- PGM_PERS_DETL.STAT_CODE in ('AC, 'IN')
- Oct 1 will be between the PGM_PERS_DETL.BEG_DATE and the PGM_PERS_DETL.END_DATE
- PGM_PERS_DETL.ROLE_CODE = 'ME'

v. The participant is not an Active member or Ineligible on a CalWORKs program as of 10/1

Tech Note:

- PGM.PGM_CODE = 'CW'
- Oct 1 will be between the PGM_PERS_DETL.BEG_DATE and the PGM_PERS_DETL.END_DATE
- PGM_PERS_DETL.STAT_CODE = 'AC'
    a. And PGM_PERS_DETL.ROLE_CODE = 'ME'
    b. And PGM_PERS_DETL.CREATED_ON is prior to Oct 1

  OR PGM_PERS_DETL.STAT_CODE = 'IN'

vi. No new individuals counted in sections PART A and PART B shall be counted as carried forward in item 53 and vice versa.

- The STAT 47 and STAT 47 Part F Backup Report share the same PySpark report code for Part F information. The 'PART F. POINT-IN-TIME WORK REGISTRANT, ABAWD, and E&T PARTICIPANT COUNTS' information shall reconcile between the STAT 47 and STAT 47 Part F Backup Report. The STAT 47 report currently takes the data generated in the STAT 47 Part F Backup Report to populate its

'PART F' section during the January report generation for the October quarter.

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

Total Field	Total Field Description
Line 53. CalFresh E&T Participants on October 1	This population is the count of all CalFresh E&T participants in a CFET component carried forward to October 1 of the reporting period. This entails the participant is a work registrant as of 9/30 and is participating in a component/activity (those components/activities counted towards the CFET components in sections PART C and PART D) that is not ended before 10/01. No individuals counted in sections PART A and PART B shall be counted in item 53 and vice versa. This is equal to the count for item 53, cell 563 on the STAT 47. **Tech Note:** The begin date (CUST_ACTIV.BEG_DATE) of the component/activity will have a begin date prior to Oct 1 and the end date (CUST_ACTIV.END_DATE) of the

	component/activity is greater than or equal to Oct 1.

ii. This total field will go below the total for 'Line 52. ABAWDs on October 1'

e. Update the sheet to add ~~two~~ three new columns for the Activity 'Begin Date', ~~and~~ Activity 'End Date' and 'Type'.

Column Name	Column Description
Type	This is the type of CalFresh E&T component/activity the CalFresh E&T participant is participating in as of October 1st. This can be a CFET or GROW activity. **Note**: this can be blank for records where the individual is not participating in a CalFresh E&T component/activity. **Tech Note**: CODE_DETL.SHORT_DECODE_NAME where CODE_DETL.CATGRY_ID = 56 AND CODE_DETL.CODE_NUM_IDENTIF = CUST_ACTIV.TYPE_CODE
Activity Begin Date	This will be the Begin Date of the latest component/activity for which the CalFresh E&T participant is enrolled in as of October 1st. Format: mm/dd/yyyy **Note:** this can be blank for records where the individual is not participating in a CalFresh E&T component/activity. **Tech Note:** The begin date (CUST_ACTIV.BEG_DATE) of the component/activity will have a begin date prior to Oct 1.
Activity End Date	This will be the End Date of the latest activity for which the CalFresh E&T participant is enrolled in as of October 1st. Format: mm/dd/yyyy

	Note: this can be blank for records where the individual is not participating in a CalFresh E&T component/activity or the end date has not been determined. **Tech Note:** The end date (CUST_ACTIV.END_DATE) of the component/activity is greater than or equal to Oct 1.

f. Add filters to the sheet.
   i. When the filters are applied, the dynamic 'Total' count on the right of the sheet shall dynamically update as well depending on the filters selected.

2.2.4 Report Location

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

2.2.5 Counties Impacted

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

2.2.6 Security Updates

3. Security Rights

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

4. Security Groups

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

2.2.7 Report Usage/Performance

No significant performance impact or report usage is expected.

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

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

4.2 Migration Requirements

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

5 APPENDIX

5.1 Component/Activity to CFET Component Mapping

Component/Activity (Short Decode Value)	CFET Component Listed on STAT 47	New/ Existing Component	Line Item
CFET Components			
Orientation/Assessment (OA) • CUST_ACTIV.TYPE_CODE = 'OA' • CT 56	Orientation/Assessment (OA)	New	5
Supv. Job Search (Non-Qualifying) • CUST_ACTIV.TYPE_CODE = 'NQF' • CT 56	Supervised Job Search (SJS)	New	6b, 27b, 6c, 27c
Supv. Job Search (WIOA and Veterans) • CUST_ACTIV.TYPE_CODE = 'WAV' • CT 56	Supervised Job Search (SJS)	New	6a, 27a
Workfare • CUST_ACTIV.TYPE_CODE = 'WF' • CT 56 **Note:** This activity belongs to both the CFET and GROW program. In the scenario the participant has a Workfare activity under both the CFET and GROW programs, to avoid double counting we will take the Workfare activity record with the latest Begin Date (CUST_ACTIV.BEG_DATE)	Workfare (W)	Existing	7, 28
Self-Employment Training (SET) • CUST_ACTIV.TYPE_CODE = 'SET' • CT 56	Self-Employment Training (SET)	New	8, 29
Job Retention • CUST_ACTIV.TYPE_CODE = 'FR' • CT 56	Job Retention (JR)	Existing	9, 30
EDU Prog. Basic (EPB) • CUST_ACTIV.TYPE_CODE = 'EPB'	Education Program Basic (EPB)	New	10, 31

• CT 56			
EDU Prog. Career (EPC) • CUST_ACTIV.TYPE_CODE = 'EPC' • CT 56	Education Program Career (EPC)	New	11, 32
EDU Prog. English Language (EPEL) • CUST_ACTIV.TYPE_CODE = 'EPE' • CT 56	Education Program English Language (EPEL)	New	12, 33
EDU Prog. Integrated (EPI) • CUST_ACTIV.TYPE_CODE = 'EPI' • CT 56	Education Program Integrated (EPI)	New	13, 34
EDU Prog. Work Readiness Training (EPWRT) • CUST_ACTIV.TYPE_CODE = 'EPW' • CT 56	Education Program Work Readiness Training (EPWRT)	New	14, 35
Work Activity (WA) • CUST_ACTIV.TYPE_CODE = 'WA' • CT 56	Work Activity (WA)	New	15, 36
WBL Internship (WBLI) • CUST_ACTIV.TYPE_CODE = 'WBL' • CT 56	Work-Based Learning Internship (WBLI)	New	16, 37
WBL Internship Subs. (WBLI-SUB) • CUST_ACTIV.TYPE_CODE = 'WBI' • CT 56	Work-Based Learning Internship Subsidized (WBLI-SUB)	New	17, 38
WBL On-the-Job Training (WBLOJT) • CUST_ACTIV.TYPE_CODE = 'WBJ' • CT 56	Work-Based Learning On-the-Job Training (WBLOJT)	New	18, 39
WBL Pre-apprenticeship (WBLPA) • CUST_ACTIV.TYPE_CODE = 'WBP' • CT 56	Work-Based Learning Pre-apprenticeship (WBLPA)	New	19, 40
WBL Pre-apprenticeship Subs. (WBLPA-SUB) • CUST_ACTIV.TYPE_CODE = 'WAS' • CT 56	Work-Based Learning Pre-apprenticeship Subsidized (WBLPA-SUB)	New	20, 41
WBL Apprenticeship (WBLA) • CUST_ACTIV.TYPE_CODE = 'WLA' • CT 56	Work-Based Learning Apprenticeship (WBLA)	New	21, 42

WBL Apprenticeship Subs. (WBLA-SUB) • CUST_ACTIV.TYPE_CODE = 'WAU' • CT 56	Work-Based Learning Apprenticeship Subsidized (WBLA-SUB)	New	22, 43
WBL Transitional Jobs (WBLTJ) • CUST_ACTIV.TYPE_CODE = 'WTJ' • CT 56	Work-Based Learning Transitional Jobs (WBLTJ)	New	23, 44
WBL Transitional Jobs Subs. (WBLTJ-SUB) • CUST_ACTIV.TYPE_CODE = 'WTS' CT 56	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
WBL Other (WBLO) • CUST_ACTIV.TYPE_CODE = 'WBO' • CT 56	Work-Based Learning Other (WBLO)	New	25, 46
WBL Other Subs. (WBLO-SUB) • CUST_ACTIV.TYPE_CODE = 'WBS' • CT 56	Work-Based Learning Other Subsidized (WBLO-SUB)	New	26, 47
GROW Activities			
Intensive Case Management • CUST_ACTIV.TYPE_CODE = 'G12' • CT 56	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Job Fair • CUST_ACTIV.TYPE_CODE = 'G15' • CT 56	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
One-Stop • CUST_ACTIV.TYPE_CODE = 'G34' • CT 56	Supervised Job Search (SJS) (WIOA and Veterans)	New	6a, 27a
	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Job Readiness Training • CUST_ACTIV.TYPE_CODE = 'G04' • CT 56	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c

Job Readiness Training for Youth • CUST_ACTIV.TYPE_CODE = 'G05' • CT 56	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Pathways to Success • CUST_ACTIV.TYPE_CODE = 'G06' • CT 56	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Career Opportunities Resources & Employment • CUST_ACTIV.TYPE_CODE = 'G07' • CT 56	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Education & Training • CUST_ACTIV.TYPE_CODE = 'G08' • CT 56	Education Program Work Readiness Training (EPWRT)	New	14, 35
Security Office Training • CUST_ACTIV.TYPE_CODE = 'G30' • CT 56	Education Program Career (EPC)	New	11, 32
Office Occupations • CUST_ACTIV.TYPE_CODE = 'G32' • CT 56	Education Program Career (EPC)	New	11, 32
Computer Application Class • CUST_ACTIV.TYPE_CODE = 'G33' • CT 56	Education Program Career (EPC)	New	11, 32
Short-Term Training • CUST_ACTIV.TYPE_CODE = 'ST' • CT 56	Education Program Career (EPC)	New	11, 32
GED • CUST_ACTIV.TYPE_CODE = 'G09' • CT 56	Education Program Career (EPC)	New	11, 32

Literacy • CUST_ACTIV.TYPE_CODE = 'G10' • CT 56	Education Program Basic (EPB)	New	10, 31
Self-Initiated Program • CUST_ACTIV.TYPE_CODE = 'SP' • CT 56	Education Program Career (EPC)	New	11, 32
Activity #1 – EDU • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32
Activity #2 – EDU • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32
Activity #3 – EDU • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32
Activity #4- WEP • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45

into the system. See Assumption #4 for more detail.			
Activity #5- WEP • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Activity #6- WEP • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Activity #7-WEP • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Activity #8-SJS • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Activity #9-SJS • Code value to be determined by developer working on SCR CA-254559	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c

• This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.			
Activity #10- SET • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Self-Employment Training (SET)	New	8, 29
Apprenticeship • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Apprenticeship Subsidized (WBLA-SUB)	New	22, 43
Assessment • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Orientation/Assessment (OA)	New	5
Career Exploration Month #1 • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Career Exploration Month #2	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b,

• Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.			6c, 27c
Career Exploration Month #3 • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
Careers for a Cause (C4C) • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32
Community College • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32
Entrepreneurship • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed	Self-Employment Training (SET)	New	8, 29

into the system. See Assumption #4 for more detail.			
Financial Literacy • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Basic (EPB)	New	10, 31
License/Certificate/Exam (LCE) • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32
Ready, Set, START! • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Basic (EPB)	New	10, 31
RightWay • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Supervised Job Search (SJS) (Non-Qualifying)	New	6b, 27b, 6c, 27c
	Education Program Work Readiness Training (EPWRT)	New	14, 35
START Learning • Code value to be determined by developer working on SCR CA-254559	Education Program Work Readiness Training (EPWRT)	New	14, 35

• This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.			
START ORIENTATION • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Orientation/Assessment (OA)	New	5
Subsidized Employment • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Unsubsidized Employment • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs (WBLTJ)	New	23, 44
TAYPortunity Program • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45

TAYPortunity Transitional Subsidized Employment • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Workfare • CUST_ACTIV.TYPE_CODE = 'WF' • CT 56 **Note:** This activity belongs to both the CFET and GROW program. In the scenario the participant has a Workfare activity under both the CFET and GROW programs, to avoid double counting we will take the Workfare activity record with the latest Begin Date (CUST_ACTIV.BEG_DATE) This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Workfare (W)	Existing	7, 28
CFET Retention Services • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Job Retention (JR)	Existing	9, 30
GROW Transition-Age Youth Employment Program (GTEP) • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45

into the system. See Assumption #4 for more detail.			
GROW Youth Employment Program (GYEP) • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Work-Based Learning Transitional Jobs Subsidized (WBLTJ-SUB)	New	24, 45
Life Skills • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Basic (EPB)	New	10, 31
Vocational Assessment • Code value to be determined by developer working on SCR CA-254559 • This new GROW activity will not be present in the report until SCR CA-281036 gets deployed into the system. See Assumption #4 for more detail.	Education Program Career (EPC)	New	11, 32

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-265665

Add a Duplicate Person Indicator and Update Duplicate Person List page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Trevor Torres, Matthew Lower
	Reviewed By	Ignacio Lazaro, Dymas Pena

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/08/2024	1.0	Initial Design	Trevor Torres
09/18/2024	1.1	Content Revision: Updating validation process, messaging and mockups in section 2.3. Updating Duplicate Person Indicator design in section 2.1.3. Design Clarifications for Security Rights in sections 2.3.5.	Trevor Torres

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1 OVERVIEW

Currently, the duplication process does not visually change the duplicate record when they have been marked as a duplicate. On the Case Summary or Individual Demographics pages, you cannot tell that the record has been identified as a duplicate.

1.1 Current Design

When a person is marked as a Duplicate, the only place where that information is available is the Duplicate Person List page (accessible from the Individual Demographics Detail page in Edit Mode only).

A user looking at the Case Summary page has no idea which person is marked as a duplicate.

1.2 Requests

1. Add a visual indicator identifying that the record is marked as a Duplicate. This will allow workers to handle duplicate records more efficiently.
2. Update the Individual Demographics Detail page to allow the Duplicate List Button to be available in 'View' Mode.
3. Create an 'Edit' Mode for the Duplicate Person List page.

1.3 Overview of Recommendations

1. Add the text "(dup)" at end of a person's name, where the format is "Last Name, First Name, Age, Gender" (ex: Smith, John 40M).
2. Update the Duplicate Person List page to update the View mode to allow for more functionality and include a new Edit mode.
    a. Add a button to the "Edit" mode to allow users to determine the record they are working on is a "Golden Record" or a "Duplicate".
    b. Add a "Comments" section that will require users to provide more information as to the decision to adjust the record.
    c. Add a "History Details" section to the Duplicate Person List page that will display information about who made the changes and what was changed to the duplicate record.
    d. Update additional elements of the Duplicate List Person page, such as the wording on the "Golden Record" perspective and "Duplicate Person" perspective.
3. Add an Auto-Journal to the Duplicate Person List page.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.
2. The "(dup)" indicator will not be sent in the transactions to MEDS.

3. The "(dup)" indicator at the end of a person's name, where the format is "Last Name, First Name, Age, Gender" will be applied to every instance to all pages in the system in SCR "CA-282926".
4. The Auto-Journals for the Duplicate Person List page will not go through the process as described in SCR CA-235880.
5. The Security Right 'DuplicatePersonListEdit' will be needed to use the functionality of the 'DuplicatePersonListByPassDupCINValidation' Security Right.

2 RECOMMENDATIONS

Currently, the duplication process does not mark the duplicate bad record as a record that should not be looked at or used.

When a person is marked as a Duplicate, the only place where that information is available is the Duplicate Person List page (accessible from the Individual Demographics Detail page in Edit Mode only).

2.1 Duplicate Person Name Display

2.1.1 Overview

Currently, the duplication process does not visually change the duplicate record when they have been marked as a duplicate. On the Case Summary or Individual Demographics pages, you cannot tell that the record has been identified as a duplicate.

2.1.2 Duplicate Person Name Display Mockup

Figure 2.1.2.1 – Duplicate Name Indicator Example Program Block

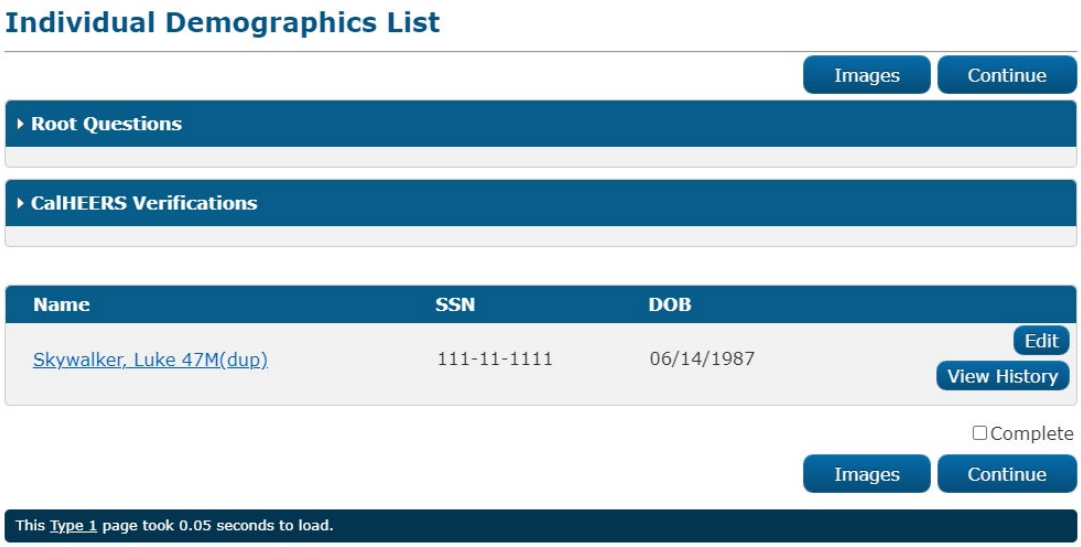

Figure 2.1.2.2– Duplicate Name Indicator Example Individual Demographics

2.1.3 Description of Changes

1. Add the text "(dup)" at end of a person's name, where the format is "Last Name, First Name, Age, Gender" (ex: Smith, John 40M) if they are marked as a duplicate, including existing duplicate records.
    a. The "(dup)" indicator at the end of a person's name will be applied to every instance to ~~all pages in the system~~ these specific pages:
        i. Individual Demographics List
        ii. Individual Demographics Detail
        iii. Duplicate Person List

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Individual Demographics

2.1.5 Page Mapping

N/A

2.1.6 Page Usage/Data Volume Impacts

N/A

2.1.7 Accessibility

N/A

2.2 Case Summary

2.2.1 Overview

Currently, the duplication process does not visually change the duplicate record when they have been marked as a duplicate. On the Case Summary or Individual Demographics pages, you cannot tell that the record has been identified as a duplicate.

2.2.2 Case Summary Mockup

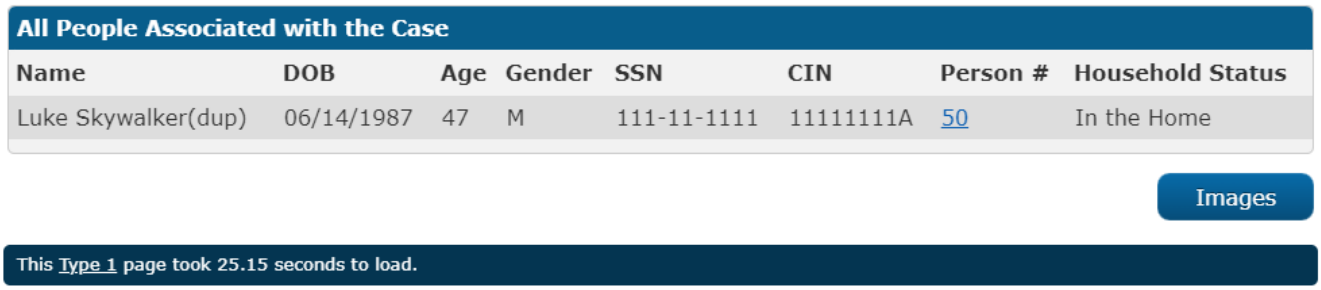

Figure 2.1.2.1 – Duplicate Name Indicator Example Case Summary

2.2.3 Description of Changes

1. Add the text "(dup)" at end of a person's name in the "All People Associated with the Case" section if they are marked as a duplicate.
    a. This update to the name string will function similarly to "Deemed/(de)" and "Pregnant/(pg)" functionality.
        i. If a person also has "Deemed/(de)" or "Pregnant/(pg)" within the Case Summary and is marked as a duplicate, it will display both the "(pg)/(de)" and "(dup)" and indicators; with the "(pg)/(de)" indicators to display first.

2.2.4 Page Location

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

2.2.5 Page Mapping

N/A

2.2.6 Page Usage/Data Volume Impacts

N/A

2.2.7 Accessibility

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

2.3 Duplicate Person List

2.3.1 Overview

This page allows you to indicate when a person's record is a duplicate of another person. This SCR will update the View Mode and add an Edit mode.

2.3.2 Duplicate Person List Mockup

Figure 2.3.2.1 – Duplicate Person List View Mode Before Selecting a Record Mockup

---

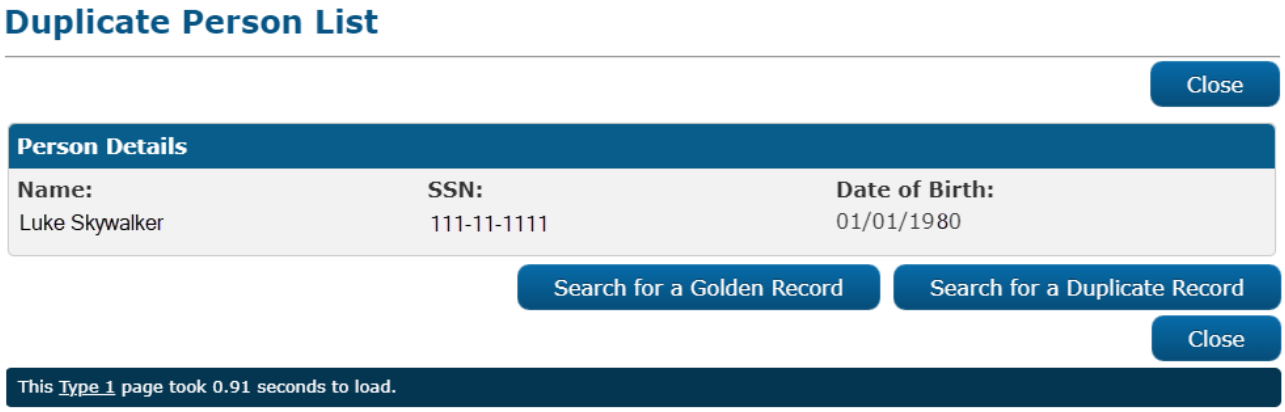

Figure 2.3.2.2 – Duplicate Person List Edit Mode Before Selecting Record Mockup

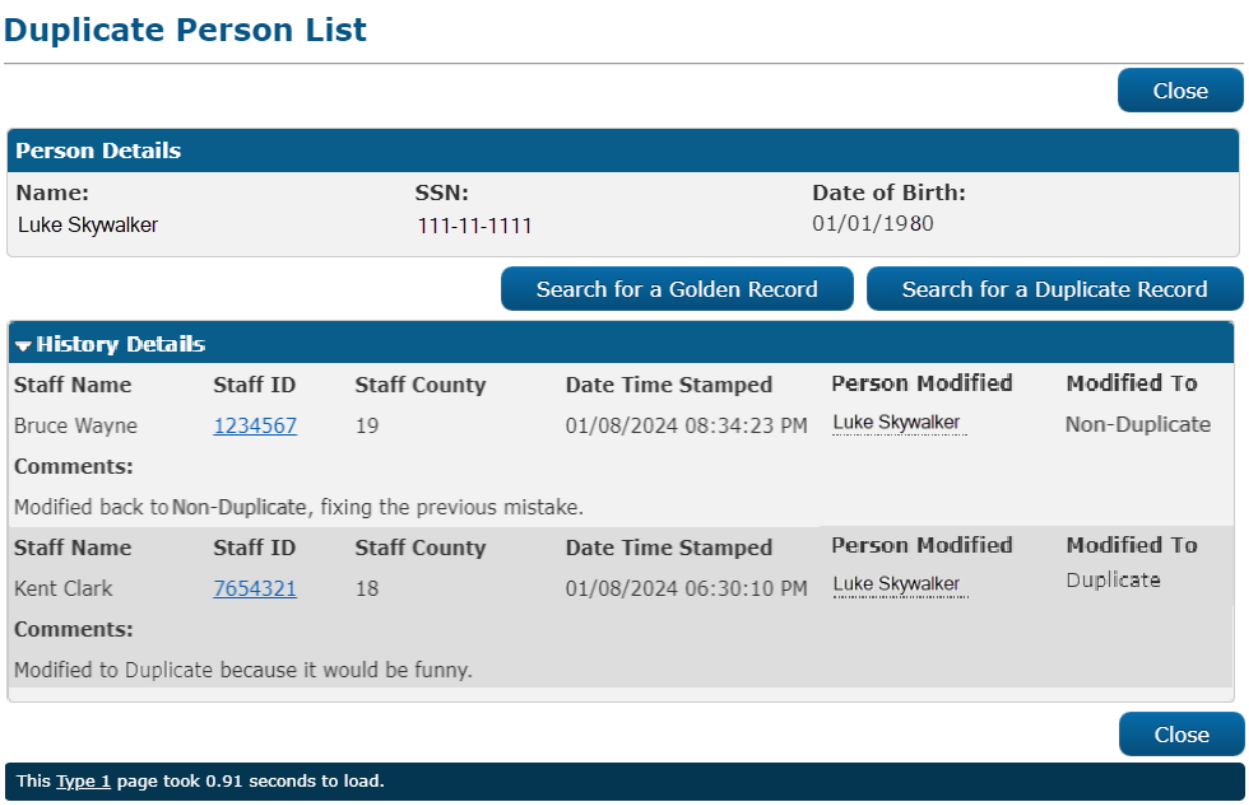

Figure 2.3.2.2.1 – Duplicate Person List Edit Mode Before Selecting Record w/ History Mockup

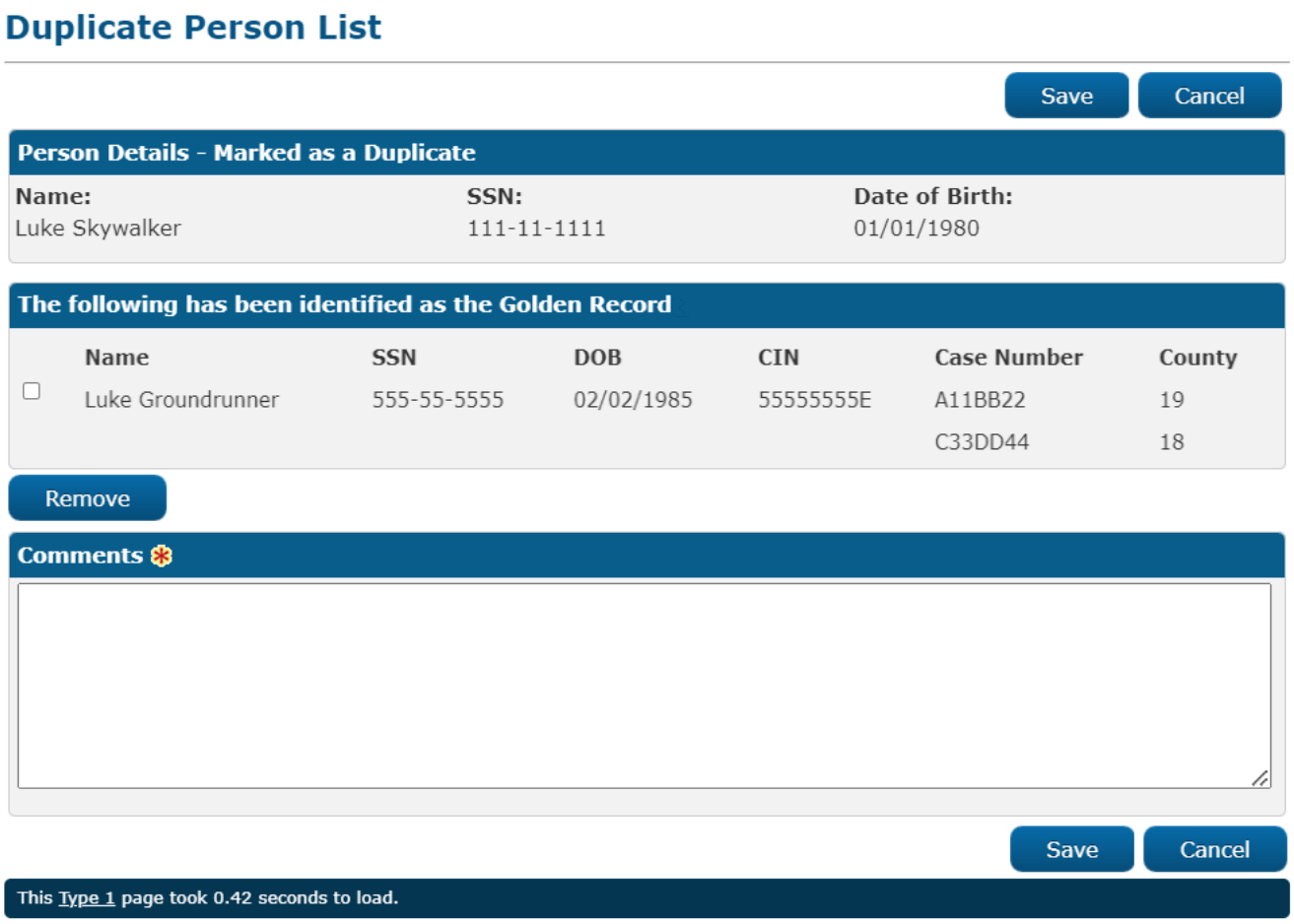

Figure 2.3.2.3 – Duplicate Person List 'Create' Mode After Selecting the "Golden Record" Mockup

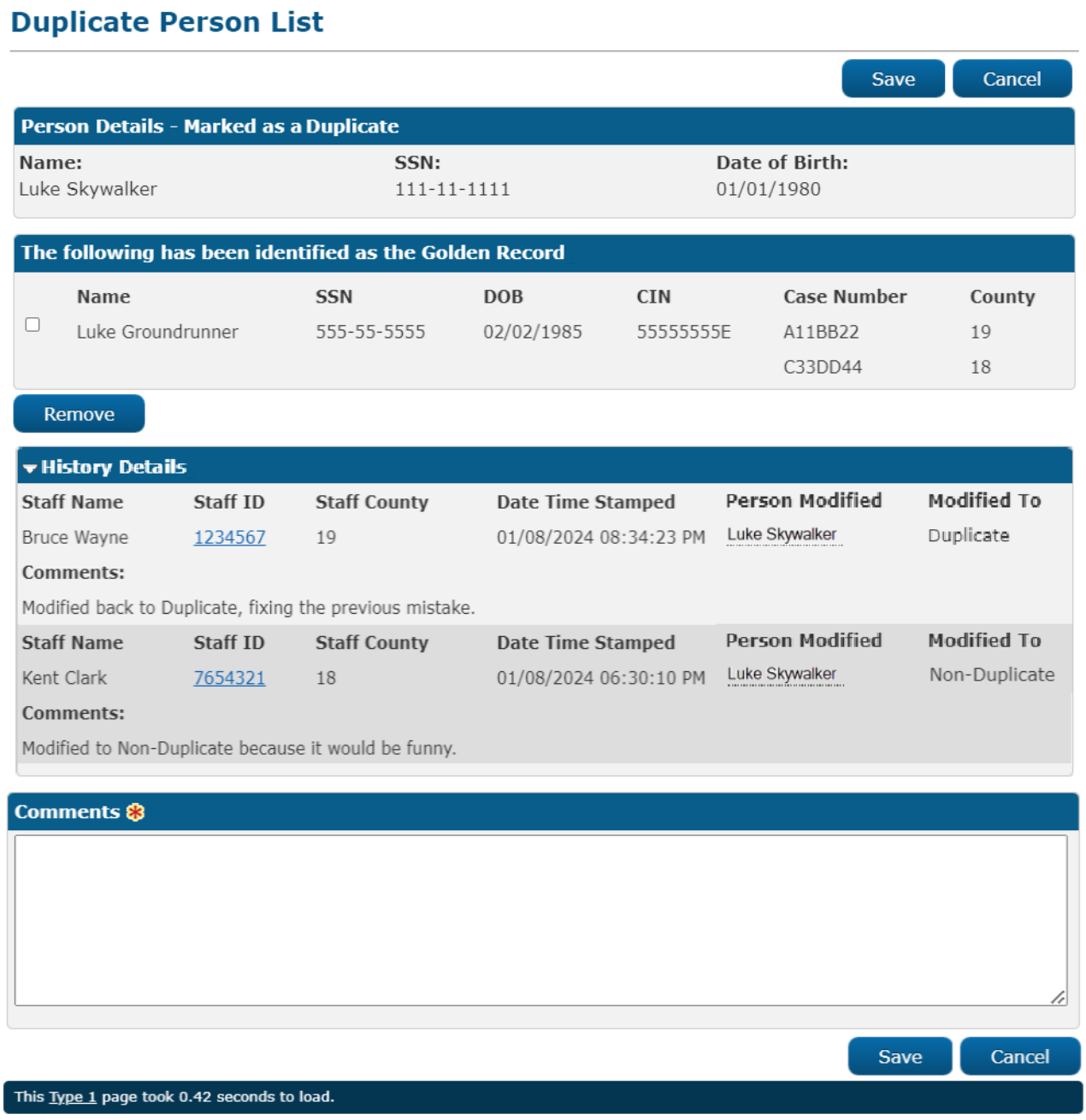

Figure 2.3.2.4 – Duplicate Person List 'Create' Mode with History Mockup

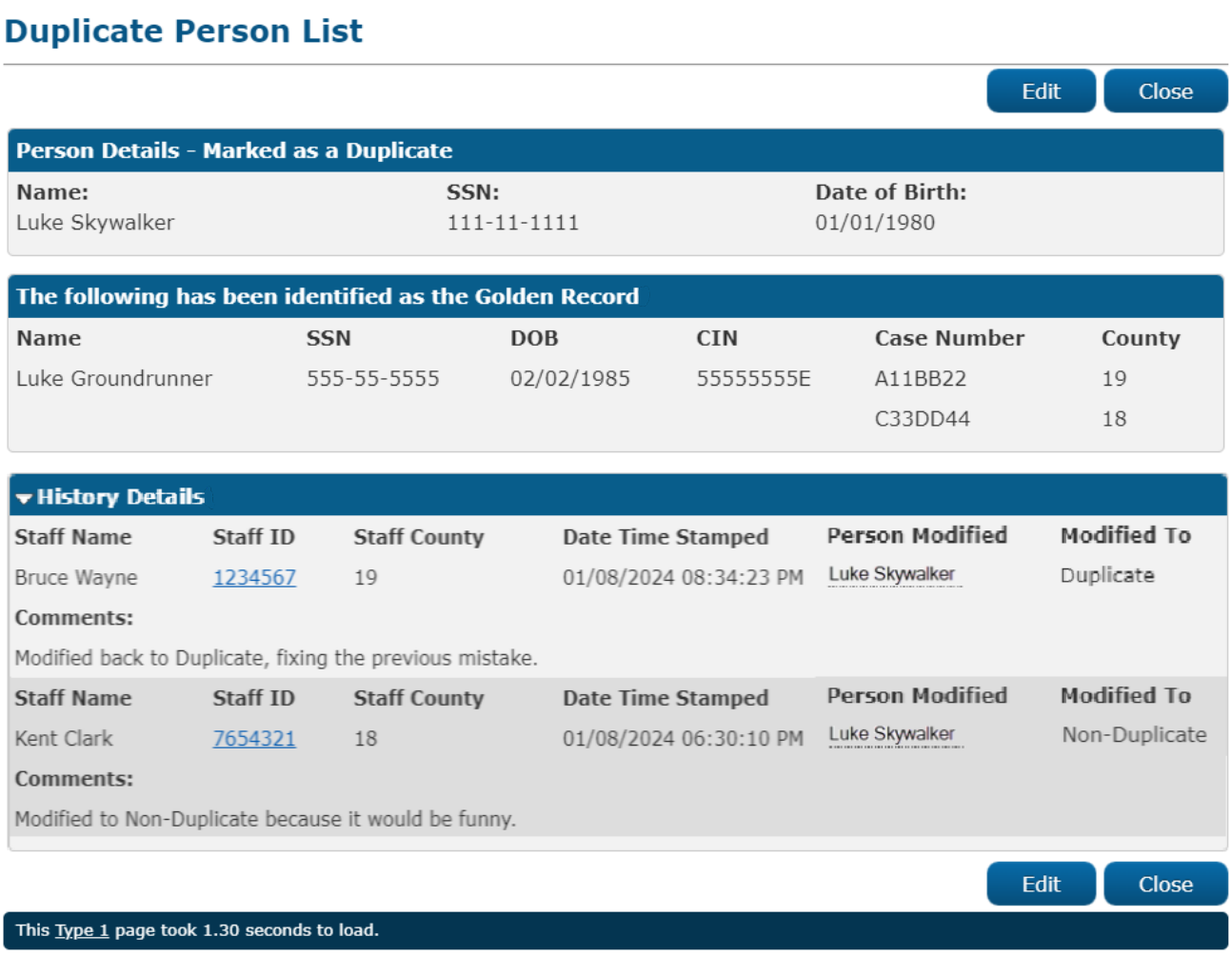

Figure 2.3.2.5 – Duplicate Person List View Mode After Selecting a Record Mockup

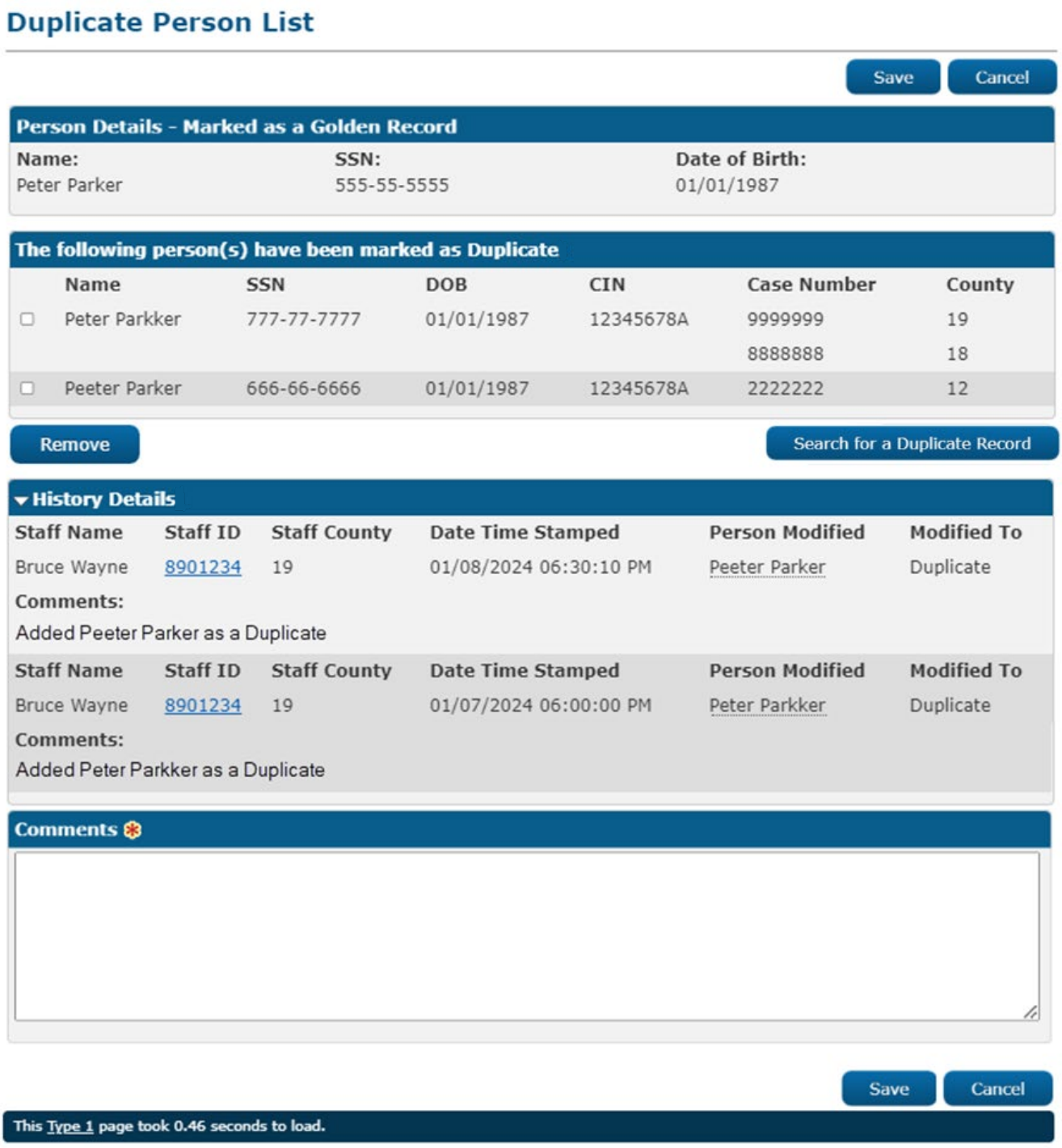

Figure 2.3.2.6 – Duplicate Person List Edit Mode "Golden Record Perspective" Mockup

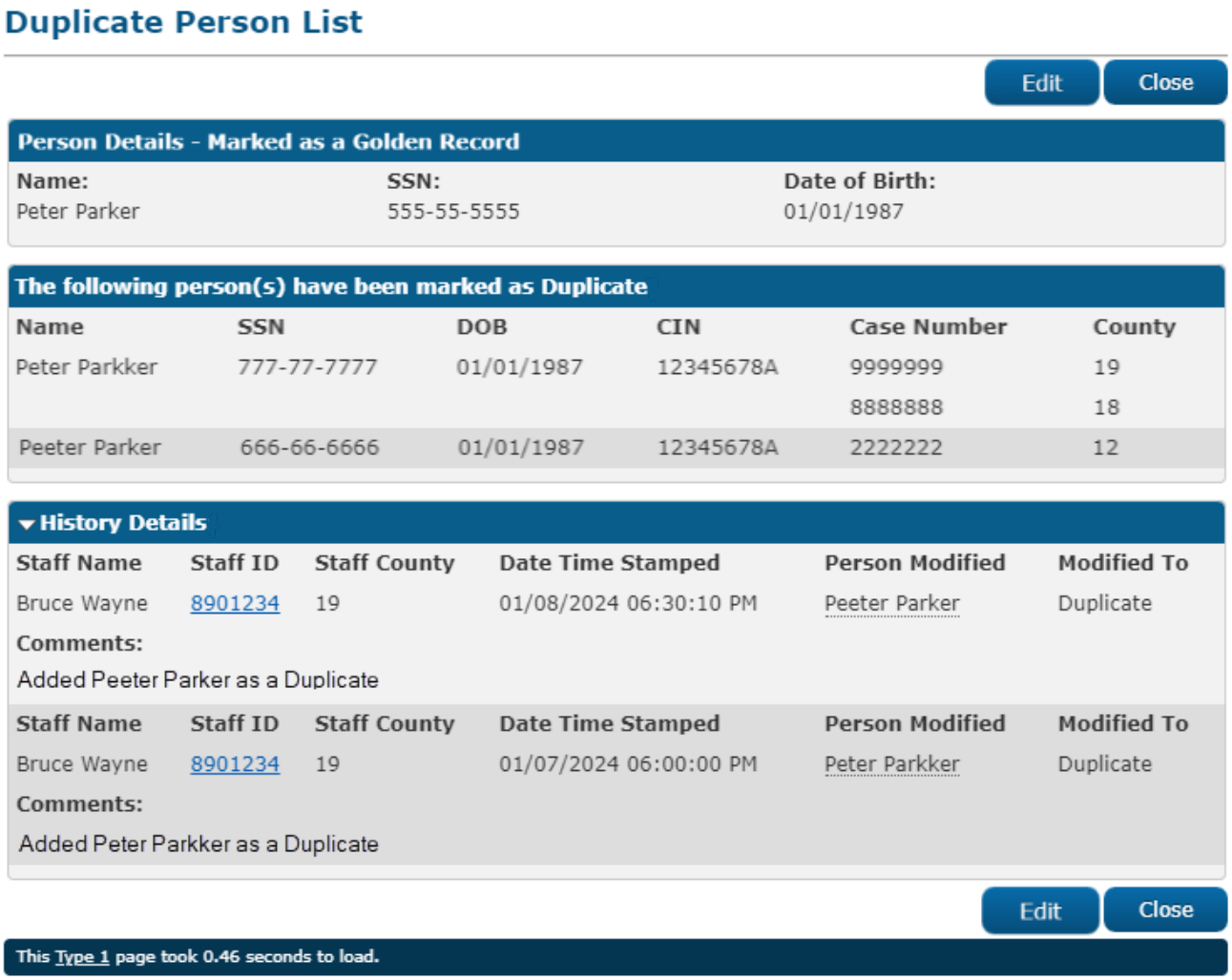

Figure 2.3.2.7 – Duplicate Person List View Mode "Golden Record Perspective" Mockup

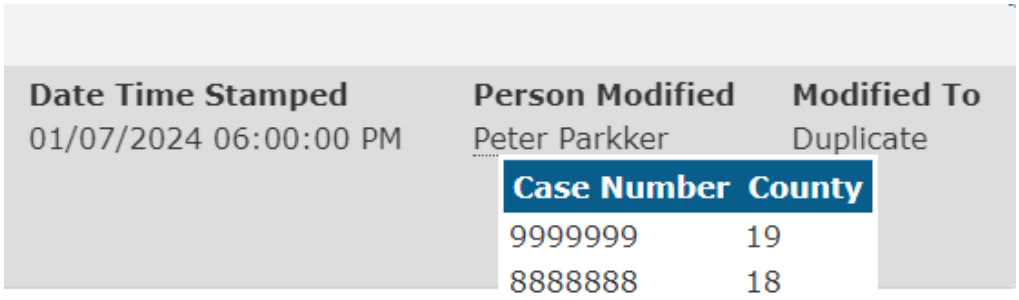

Figure 2.3.2.8 – Duplicate Person List "Person Modified" Tooltip Mockup

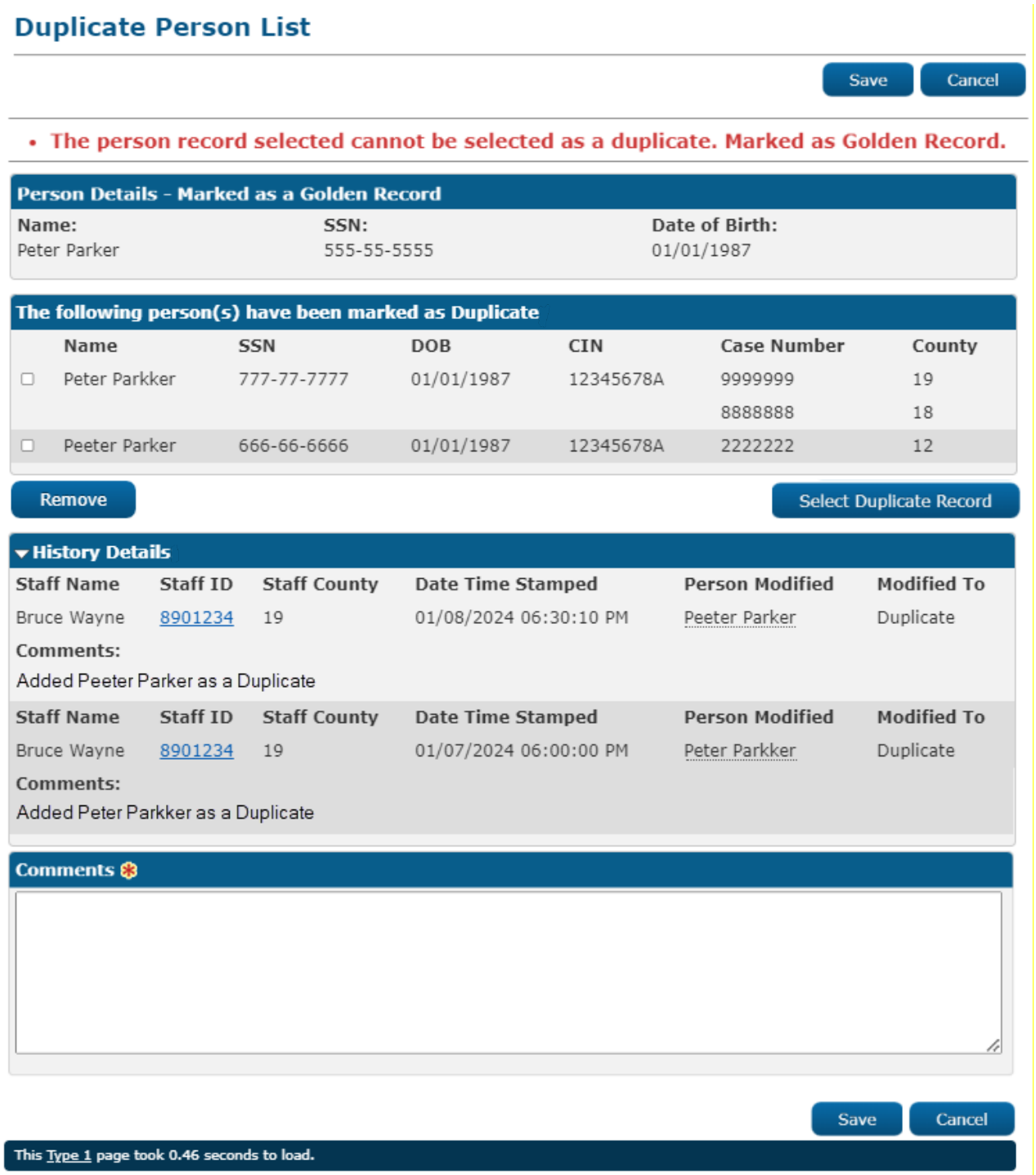

Figure 2.3.2.9 – Duplicate Person List "Golden Record" Validation Message Mockup

2.3.3 Description of Changes

1. Update the Duplicate Person List page to update the 'View' mode and add an 'Edit' and 'Create' mode.

a. Update Security Rights and Groups related to 'Edit' mode for the Duplicate Person List page (more information in Section 2.3.5).
    i. Update the 'DuplicatePersonListEdit' Security Right from only allowing access to the "Select" and "Remove" buttons into accessing the new 'Edit' mode to the Duplicate Person List page.
        1. 'DuplicatePersonListEdit' is an existing Security Right.
    ii. Update the Security Group 'Duplicate Person' to be labeled into 'Duplicate Person View' and add a new Security Group labeled 'Duplicate Person Edit'.
        1. Update the 'Right to Group Mapping' for these new Security Groups (more information in Section 2.3.5).
        2. Roles that currently have the 'Duplicate Person' Security Group will automatically be assigned to the 'Duplicate Person View' Security Group; the 'Duplicate Person Edit' Security Group will be assigned to whichever Roles manually.
b. Update the button on the 'Edit' mode from "Select" to "Search for a Golden Record", as shown in Figure 2.3.2.2.
    i. Update the wording of "Person Details" when the record being viewed on has been marked as a duplicate to "Person Details – Marked as a Duplicate", as shown in Figure 2.3.2.3 and Figure 2.3.2.5.
        1. An example of updating this section would be when a record is selected using the "Search for a Golden Record" button.
    ii. Update the wording of "This person is a duplicate of the following person record:" to "The following has been identified as the Golden Record" when a record that is being viewed on has selected a 'Golden Record', as shown in Figure 2.3.2.3 and Figure 2.3.2.5.
        1. An example of updating this wording would be when a record is selected using this "Search for a Golden Record".
        2. This section will dynamically hide if there are no records for it to display and will dynamically appear when there are records to display in 'View' mode.
    iii. Add a "County" field to "The following has been identified as the Golden Record" section, that will display the record's county information, as shown in Figure 2.3.2.3 and Figure 2.3.2.5.
c. Add an additional button on the 'Edit' mode that will be labeled as "Search for a Duplicate Record", as shown in Figure 2.3.2.2.

i. This button will have similar functionality of the existing "Search for a Golden Record" button of taking the user to the "Select Person" page for searching and selecting a record (as documented in Section 2.4), with the difference of this button will be that the record selected will be identified as a "Duplicate" of the record that is being edited/viewed, rather than being identified as the "Golden Record" of the record that is being edited/viewed.
ii. Update the wording of "Person Details" when the record being viewed on has been identified as a Golden Record to "Person Details –Marked as a Golden Record", as shown in Figure 2.3.2.6 and Figure 2.3.2.7.
    1. An example of updating this section would be when a record is selected using this "Search for a Duplicate Record".
iii. Update the wording of "This person is a duplicate of the following person record:" to "The following person(s) have been marked as Duplicate" when a record that is being viewed on has selected a 'Duplicate', as shown in Figure 2.3.2.6 and Figure 2.3.2.7.
    1. An example of updating this section would be when a record is selected using this "Search for a Duplicate Record".
    2. This section will dynamically hide if there are no records for it to display and will dynamically appear when there are records to display.
    3. When in 'Create' and 'Edit' mode for a record that is being viewed on is identified as a "Golden Record", include a "Search for a Duplicate Record" button under the "The following person(s) have been marked as Duplicate" section that will allow the user to select another record to add to this section, as shown in Figure 2.3.2.6
        a. This specific button will dynamically hide on the 'Create' and 'Edit' if the record being viewed on is no longer identified as a "Golden Record".
iv. Add a "County" field to "The following person(s) have been marked as Duplicate" section, that will display the records county information, as shown in Figure 2.3.2.6 and Figure 2.3.2.7.

d. Add a "History Details" section, that provides information on the user who made the change to duplicate records, as shown in Figures 2.3.2.4, Figure 2.3.2.5, Figure 2.3.2.6, and Figure 2.3.2.7.
    i. The "History Details" record will only be generated when the user has "marked" or "unmarked" a person record as a "duplicate".

1. Instances can be generated from both the "Duplicate" and "Golden Record" perspectives.

ii. The "History Details" section will display in every mode of the page if the record has an instance in that section, as shown in Figure 2.3.2.4.
    1. Otherwise, the "History Details" section will dynamically hide.
    2. When viewing a record that has been identified as a Golden Record, the "History Details" section will display every instance of all the 'duplicates' in the "The following person(s) have been marked as Duplicate" section, as shown in Figure 2.3.2.6

iii. The "Staff Name", "Staff ID", and "Staff County" fields will pull the name, the staff ID, and the County number of the worker from the staff that made the change.
    1. The Staff ID will link to the worker's Worker Detail page.

iv. The "Date Time Stamped" field will generate the date and time the user made a change when saving the Duplicate Person List page.
    1. These instances of "History Details" will be sorted descending based off the most recent change.

v. The "Person Modified" field will display the name of the person record who was added or removed from the page, as shown in Figure 2.3.2.6 and Figure 2.3.2.7.
    1. The name displayed in the field will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.3.2.8.

vi. The "Modified To:" field will display the options "Duplicate" and "Non-Duplicate".
    1. The "Modified To:" field will be updated to "Duplicate" when the user marks a selected record as a duplicate.
    2. The "Modified To:" field will be updated to "Non-Duplicate" when the user unmarks a selected record as a duplicate.

vii. The "Comments:" field in the View mode will display what was written in the "Comments" section from the 'Create' and 'Edit' mode of the Duplicate Person List page.

viii. Make the "History Details" section collapsible, as shown in Figure 2.3.2.5.
    1. The section will be collapsed by default.

e. Add "Comments" section to the 'Create' and 'Edit' mode that will require users to provide more information as to the decision to adjust the record.
    i. This field will always be required.

ii. This field will ~~dynamically hide~~ not create a "History Details" instance in 'Create' or 'Edit' mode when there are no changes to the old values in the "The following has been identified as the Golden Record:" or the "The following person(s) have been identified as Duplicate" section.
    1. ~~When the "Comments" section is dynamically hidden, delete any characters inputted in the text-area.~~
    2. Ex: A record named "John" is marked as a duplicate and saved with a comment. Later, a user goes to edit and ~~removes "John" but adds this same exact "John" again before saving. In this example, the "Comments" section will still be hiding dynamically, preventing an instance to the 'History Details' section being made.~~ attempts to make a comment without removing "John" or adding another record. In this example, there will not be an instance of "Historical Details" made to record their comments.

iii. Display a validation message when the user clicks on the "Save" button or the "Remove" button when a record is selected if the text-area field has more than 2000 characters.
    1. The validation will display the following message: "Comments – [Text2000] Value is too long [Max. length: 2000.0]".

iv. Display a validation message when the user clicks on the "Save" button or the "Remove" button when a record is selected if the text-area field has 0 characters.
    1. The validation will display the following message: "Comments – Field is required. Please enter a value".

v. If there are multiple records added or removed in 'Create' or 'Edit' mode and are saved when viewing a record that has been identified as a Golden Record, the comment made will apply to each of the changes made in the "History Details' section in 'View' mode.
        a. Ex: If record #1 is removed and record #2 is added, there will be two instances in the "History Details" with the same comment.

f. If the user selects the "Cancel" button in 'Edit' mode, the button will take the user to where they were on previously.
    i. If the user was previously on the "Duplicate Person List" page from the 'View' mode, the button will take them back to there.

g. If the user selects the "Cancel" button in 'Create' mode, the button will take the user to where they were on previously.
    i. If the user was previously on the "Person Search" page, the button will take them back to there.
        1. The "Person Search" page will default to "Select Person" when returning to "Person Search" page.
h. The "Remove" button in 'Create' and 'Edit' mode will remove the person record in the "The following has been identified as the Golden Record" or will remove the records with the selected checkboxes in the "The following person(s) have been marked as Duplicate" section and save the information when clicked.
    i. This button will dynamically hide if there are no records being displayed in the "The following person(s) have been marked as Duplicate" section.
i. Update the current functionality to save the selected record when the user selects the "Save" button on the 'Create' and 'Edit' mode of this page.
j. When selecting a person record from the "Select Person" page when attempting to mark them as a duplicate, display a validation message on-load when the user returns to the "Duplicate Person List" page after using the "Select" button on the "Select Person" page if that person record has been identified as having a status as "Active" or "Pending" for a program.
    i. The validation will display the following message: "The person record selected cannot be selected as a duplicate. Active or Pending on a program.".
k. When the user clicks the "Search for a Golden Record" button on the 'Duplicate Person List' page when the person record that the user is on has been identified as having a status as "Active" or "Pending" for a program, display a validation message.
    i. The validation will display the following message: "This person record cannot be selected as a duplicate. Active or Pending on a program.".
l. When selecting a person record from the "Select Person" page when attempting to mark them as a duplicate, display a validation message on-load when the user returns to the "Duplicate Person List" page after using the "Select" button on the "Select Person" page if that person record has been identified as a Golden Record.
    i. The validation will display the following message: "The person record selected cannot be selected as a duplicate. Marked as Golden Record.", as shown in Figure 2.3.2.9.

2. Add an Auto-Journal to the Duplicate Person List page that generates when a change has been made to any case within the page with the following fields populated:
    a. Journal Category: All
    b. Journal Type: Document
    c. Initiated By:
        i. Based off the user that made the change.
    d. Method of Contact: Written
    e. Short Description: Duplicate Person
    f. Long Description:
        i. Based off the "Comments" field of the "Duplicate Person List" page.

2.3.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Individual Demographics

2.3.5 Security Updates

'DuplicatePersonListView', 'DuplicatePersonListEdit', and 'DuplicatePersonListByPassDupCINValidation' are existing security rights.

Updating the 'DuplicatePersonListEdit' Security Right from only allowing access to the "Select" and "Remove" buttons into accessing the new 'Edit' mode to the Duplicate Person List page.

Remove the Security Right "DuplicatePersonListEdit" from the 'Duplicate Person' Security group.

Updating the existing Security Group 'Duplicate Person' to be labeled into 'Duplicate Person View' and add a new Security Group labeled 'Duplicate Person Edit'. Updating the 'Right to Group Mapping' for these ~~new~~ Security Groups.

Roles that currently have the 'Duplicate Person' Security Group will automatically be assigned to the 'Duplicate Person View' Security Group; 'Duplicate Person Edit' Security Group will be assigned to whichever Roles manually.

Full functionality descriptions of the other Security Rights and Groups will be provided below.

The 'DuplicatePersonListByPassDupCINValidation' Security Right and the 'Duplicate CIN Remove' Security Group will not be altered but will still

need the Security Right 'DuplicatePersonListEdit' to use the functionality of the 'DuplicatePersonListByPassDupCINValidation' Security Right.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
DuplicatePersonListView	View duplicate person(s) list page for a person record.	Duplicate Person View, Duplicate Person Edit
DuplicatePersonListEdit	Identify, add, or remove duplicate person records from the list page for a person record.	Duplicate Person Edit
DuplicatePersonListByPassDupCINValidation	Grants end user the ability to bypass validation for duplicate CINs on the Duplicate Person List page.	Duplicate CIN Remove (No Change)

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Duplicate Person View	View duplicate person(s) list.	No Change
Duplicate Person Edit	Edit duplicate person(s) list by selecting and removing the duplicate person(s) from the list.	(County Determines Role Mapping)
Duplicate CIN Remove	Grants end user the ability to bypass validation for duplicate CINs on the Duplicate Person List page.	No Change

2.3.6 Page Mapping

Update the Page Mapping to the changes made in the Description of Changes.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.3.8 Accessibility

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

2.4 Person Search

2.4.1 Overview

This page allows you to search for and select a person or case. The page starts in "Select Person" and changes to "Person Search" after making a search for a person record. This SCR will update the page to make it not automatically save the record to the Duplicate Person List page when selected from this page.

2.4.2 Person Search Mockup

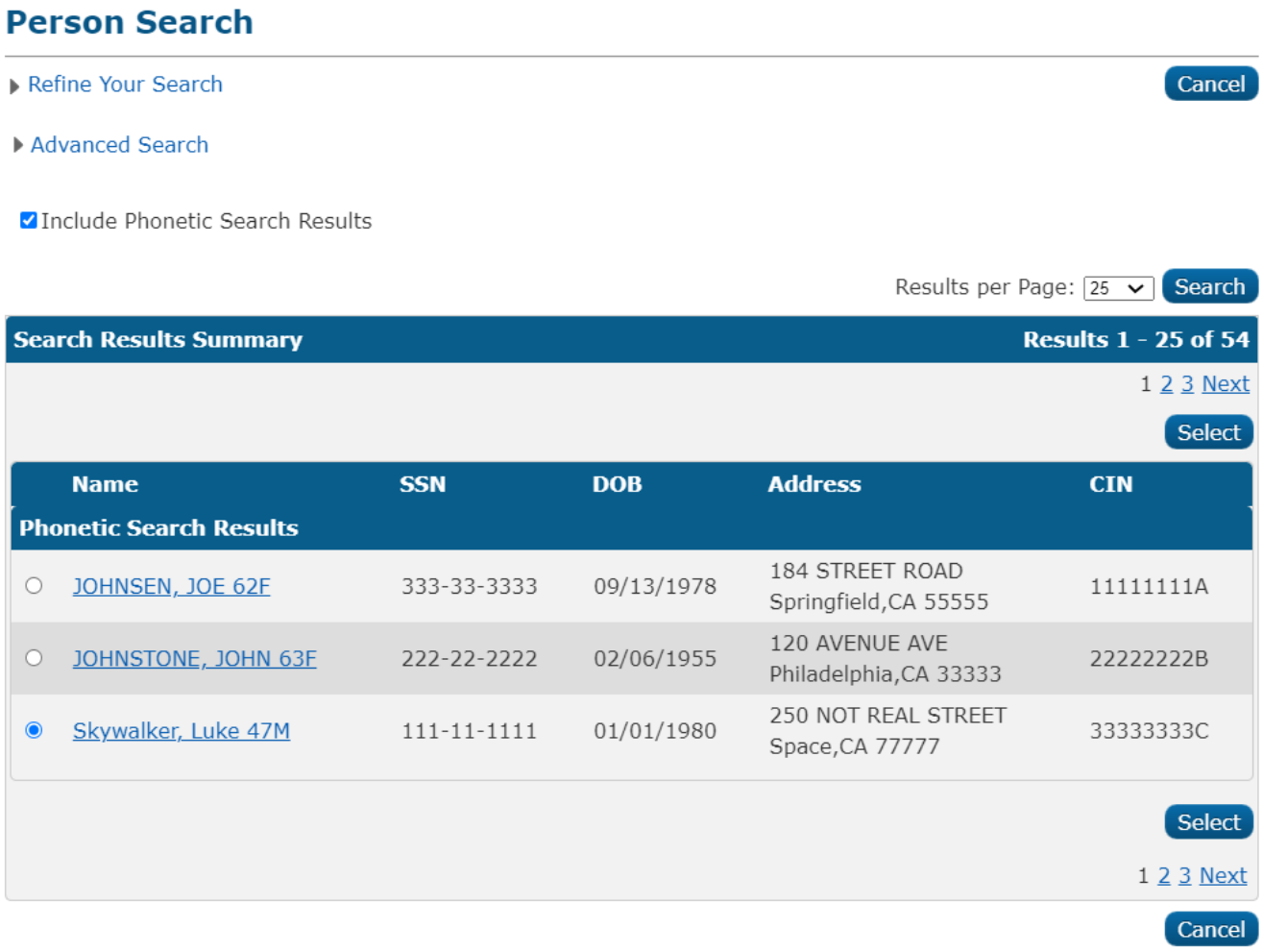

Figure 2.4.2.1 – Duplicate Person Search Example

2.4.3 Description of Changes

1. When using the "Search for Golden Record" or "Search for Duplicate Record" buttons, documented in Section 2.3, update the "Person Search" page with the following:

a. Update to make the page not automatically save the selected record to the Duplicate Person List page.
b. After selecting a record, the page will take the user to the 'Create' mode of the Duplicate Person List page.

2.4.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Individual Demographics

2.4.5 Page Mapping

Update the Page Mapping to the changes made in the Description of Changes.

2.4.6 Page Usage/Data Volume Impacts

N/A

2.4.7 Accessibility

The following Accessibility enhancements have been identified:

- Table header text should not be empty.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix for the new Security Right and Security Group	CA-265665 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.1.1.9 CAR-2067	The LRS shall include an online means for authorized security personnel to assign, update, or remove User access rights at the individual User level.	Updating the Duplicate Person List page for updating who is marked as a Duplicate.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-265742

Update existing Denial NOA "On Aid Another Case" to also generate for "Gets Duplicate Aid"

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/26/2024	1.0	Initial Draft	Dinesh Kumar Mariyappan
09/14/2024	1.1	Content Revision – Added new recommendation for person level NOA	Dinesh Kumar Mariyappan

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1 OVERVIEW

The purpose of this design is to update the existing "On Aid Another Case" NOA to also 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. Update existing Denial NOA – 'On Aid Another Case' to also generate for 'Gets Duplicate Aid' reaon for both program and person level.
   Languages include: English, Spanish, Armenian, Arabic, Chinese, Cambodian, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.3 Overview of Recommendations

1. Update existing Denial NOA – 'On Aid Another Case' to also generate for 'Gets Duplicate Aid' reaon for both program and person level.
   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. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Update existing A091D NOA to also generate for Gets Duplicate Aid

2.1.1 Overview

Update On Aid Another Case (Snippet id - 7643) NOA to also generate for "Gets Duplicate Aid" reason for program level.

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

This effort will not be updating the NOA reason verbiage.

Existing NOA verbiage (Snippet ID 7643):

"All Household members are aided on another case."

2.1.3 NOA Variable Population

This effort will not be updating the NOA variable population.

Action Fragment:

"The County has denied your application for cash aid dated <EffectiveDenialDate>.

Here's why:"

2.1.4 NOA Generation Conditions

Update Denial - On Aid Another Case(A091D) NOA to also generate when program status reason is set to "Gets Duplicate Aid" (CT73_GD).

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

1. The EDBC program is CalWORKs.
2. The program is denied in the currently run EDBC.
3. All program persons on the program are failing for the reason of 'Gets Duplicate Aid' Status reason (CT73_GD).
4. 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.

Section	Fragment ID	Fragment Filename
Action	4015	CW_DN_ACTION1
Reason	7643	CF_CW_IN_DN_50_50_CUSTODY_SPLIT_PROGRAM
Message	N/A	N/A

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

Reason Fragment Regulation

REGULATIONS : 40-103.41 and 40-105.3

2.2 Update existing A091D NOA to also generate for Gets Duplicate Aid for Person Level

2.2.1 Overview

Update On Aid Another Case (Snippet id - 7640) NOA to also generate for "Gets Duplicate Aid" reason for Person level.

State Form/NOA: NA 290

NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Programs: CalWORKs

Action Type: Denial

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.

2.2.2 NOA Verbiage

This effort will not be updating the NOA reason verbiage.

Existing NOA verbiage (Snippet ID 7640):

"<Person>

already gets <ProgramType> on another case."

2.2.3 NOA Variable Population

This effort will not be updating the NOA variable population.

Action Fragment:

"The County has denied your application for cash aid dated <EffectiveDenialDate>.

Here's why:"

2.2.4 NOA Generation Conditions

Update Denial - On Aid Another Case(A091D) NOA to also generate when person status reason is set to "Gets Duplicate Aid" (CT73_GD).

Generate a NOA with this 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.

Section	Fragment ID	Fragment Filename
Action	4015	CW_DN_ACTION1
Reason	7640	CF_CW_IN_AP_DN_50_50_CUSTODY_SPLIT_PERSON
Message	N/A	N/A

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

Reason Fragment Regulation

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 entries 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 NA290_GetsDuplicateAidPersonLevel_EN Mockup.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	CalSAWS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices. b. Redetermination, Recertification, and/or Annual Agreement notices and forms. c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices: e. Contact letters. f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site. g. Information notices and stuffers. h. Case-specific verification/referral forms. i. GR Vendor notices. k. Court-mandated notices, including Balderas notices. l. SSIAP appointment notices. m. Withdrawal forms. n. COLA notices. o. Time limit notices. p. Transitioning of aid notices. q. Interface triggered forms and notices (e.g., IFDS, IEVS). r. Non-compliance and sanction notices. s. Benefit issuance and benefit recovery forms and notices, including reminder notices. t. Corrective NOAs on State Fair Hearing decisions. u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	Gets Duplicate Aid is being added as notice in English and available threshold languages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-274104

Update the MAGI Referral Linking Flow to Allow Re-linking CalSAWS Case to New CalHEERS Case

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Renee Gustafson
	Reviewed By	Max Volf, William Baretsky, Geetha Ramalingam

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/19/2024	.01	Original Draft	Renee
06/20/2024	.02	Updated per feedback from MC Analysts	Renee
07/02/2024	.03	Updated per feedback from Build	Renee
07/09/2024	.04	Scanned Accessibility for each page and updated design.	Renee
07/17/2024	.05	Updated Sections 2.1 and 2.2 per feedback from MC Analysts	Renee
07/18/2024	.06	Updated mockups per feedback from MC Analysts	Renee
07/24/2024	.07	Reviewed with Committee Focus Group. Updated validation text for Previous Case List in Rec.2.1.3.5, Added Rec 2.1.3.2b for a max MAGI Case Search of 20. Moved the PN columns to the right for Recs 2.3.3.2, 2.4.3.1. Updated label for Update Person Number Association on MAGI Person Detail page (Rec 2.5.3.1.e).	Renee
07/26/2024	.08	Updated the Automated MAGI Case Search functionality to be controlled by a security right/group in Rec 2.1 and 2.2. Added page warning for individuals enrolled in a Covered CA Plan for Rec 2.2.3.2	Renee
08/01/2024	.09	Sent to Committee for Review	Renee
08/15/2024	1.0	Incorporated Committee Feedback. Updated Warning and Page Validation message text. Clarified when MAGI Case Search Responses will be cleared. Added Current Design for Unlinking a Referral. Added steps to correct BVs.	Renee
08/28/2024	1.1	Content Revision: Added new configuration to control the Automatic MAGI Case Search with a	Renee

		CTCR. The SCR will be implemented with the Automatic MAGI Case Search turned off, per request from CalHEERS project and turned on at a later time. Updated the Security Right/Group name.	
09/18/2024	1.2	Content Revision: Updated rec 2.4.2 mockup to show new column 'CalSAWS PN'. Updated rec 2.4.3.1 to be adding new column 'CalSAWS PN' instead of relabeling.	Renee

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1 OVERVIEW

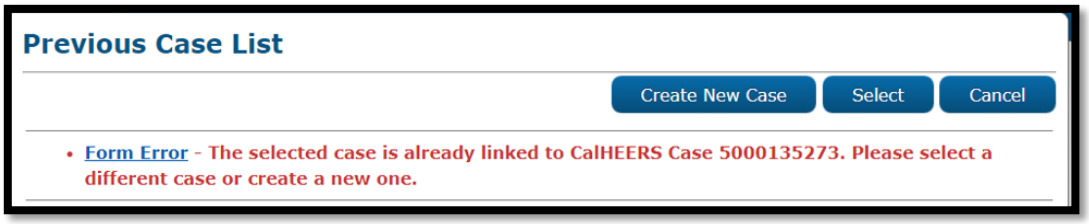
CalSAWS and CalHEERS communicate case linkage and person associations via Electronic Health Information Transfer (eHIT) in an Eligibility Determination Request (EDR), Disposition or a Determination of Eligibility Response (DER). CalHEERS locks the County of Responsibility (COR) for a CalHEERS case when there is pending or ongoing MAGI Medi-Cal eligibility based on the County and CalSAWS Case in an EDR or Disposition. CalSAWS has functionality for the user to update the case linkage and person associations in some scenarios. This SCR allows the user to update the case linkage in another scenario from within in CalSAWS. The SCR also updates page displays so the user is aware when CalSAWS is sending the 'Inter-County Transfer' = Yes, or the 'Update Person Association' = Yes in an EDR. The pages related to EDR and DER will now display both the CalSAWS and CalHEERS Person Numbers.

1.1 Current Design

CalSAWS and CalHEERS communicate case linkage between a CalSAWS case and a MAGI case via eHIT transactions. CalSAWS sends an EDR or Disposition via eHIT to CalHEERS, and CalHEERS locks the linkage between the two systems' cases including the COR. When a Medi-Cal program is denied or discontinued, CalSAWS communicates that information through a Disposition transaction to CalHEERS. CalHEERS processes the Disposition and should enable the COR on the case in CalHEERS. This 'COR Enablement' allows for CalHEERS to assign a different COR if there is a reapplication or when there is a transition back to MAGI Medi-Cal from a Covered California Program.

Case linkage updates were introduced with CA-221711 and CalHEERS Change Request 171387 but there are some scenarios the COR and CalSAWS Case in the CalHEERS Portal remains locked and the user receives a Validation Error indicating that CalHEERS cannot process the EDR because the current COR/CalSAWS Case is in another county.

When a MAGI Referral is received for a MAGI case that a user wishes to link to an existing CalSAWS case, if that CalSAWS case has linkage established to a different MAGI case, the system does not allow the user to link the MAGI Referral to the CalSAWS case when following the MAGI Referral linking flow. The user receives the following CalSAWS page validation: "Form Error – The selected case is already linked to CalHEERS Case <Current MAGI Case Number>. Please select a different case or create a new one."



CalSAWS will send an Inter-County Transfer Indicator in an EDR when there is an In Process ICT for the receiving county so CalHEERS will update the COR/Case Linkage in the CalHEERS Portal. However, the MAGI Referral Detail page does not display to the user that the ICT Indicator is being sent as 'Yes'.

The System uses the Person Number (PN) in Case Summary as the "SAWS Person Number" in the EDR. This PN is used as the MEDS Person Number and referred to as the "MEDS PN" in the MAGI-related pages. The System determines the CalHEERS Person Number associated to that SAWS Person Number in the following ways:

a. The user followed the MAGI Referral Person linking flow and linked the Unsolicited DER to the CalSAWS Case person, or
b. The user followed the ICT linking flow and linked the Incoming ICT from sending case to the receiving case person, or
c. The user followed the MAGI Case Linkage Override flow and specified/confirmed the CalHEERS-SAWS person number associations, or
d. The user edited the CalHEERS PN in the Person Association Detail page before sending an EDR, or
e. Based on the latest DER received in the system

When a CalHEERS Person Number association is already known to a person on the CalSAWS case and the user updates the Person Number on the Case Summary page, the next time an EDR is sent from that case, the system will send the new Person Number as the "SAWS Person Number", keep the association to the already known CalHEERS Person Number and include 'Update SAWS Person Association Indicator' = Yes. This informs CalHEERS to update the person associations for the person in the CalHEERS Portal. Similarly, when the user updates the CalHEERS Person Number in the 'Person Association Detail' page, the system will include the 'Update SAWS Person Association Indicator'=Yes in an EDR. The 'Update SAWS Person Association' Indicator is not displayed to the user on any page.

CalSAWS displays an 'Unlink' button on the MAGI Referral Detail page when the Determination Type is 'Referral' or 'Determination Change', and the Status is 'In Process'. This allows a user to unlink the CalSAWS case from the MAGI Referral as long as the linkage is not set from another 'Referral' or communicated to CalHEERS in an EDR or Disposition. If the linkage is already set or communicated to CalHEERS, the user will receive the following message when they click the 'Unlink' button: **Close - Unable to Unlink the case. This case link has other Referrals in Reviewed or Completed status that cannot be unlinked.**

1.2 Requests

1. Perform an automatic MAGI Case Search and allow the user to link a MAGI Referral to a CalSAWS case already linked to a different MAGI Case either when the MAGI Case Search response confirms there is no ongoing or Pending MAGI Medi-Cal eligibility, and the COR is released, and there is no actively linked CalSAWS case, or when the user confirms the currently linked MAGI Case has no ongoing or Pending MAGI Medi-Cal eligibility in CalHEERS and is delinked. Continue to prevent the user from linking to a new MAGI Case if the automatic MAGI Case Search Response has anyone with ongoing or Pending MAGI Medi-Cal eligibility in the existing linked MAGI case, or the COR or case is not delinked in CalHEERS.
2. Add a security right to only allow specified users the ability to perform the MAGI Referral Relinking of the MAGI Case.
3. Add configurability to turn off and turn on the Automatic MAGI Case Search.
4. Display the 'Inter-County Transfer' and 'Update Person Number' fields to the user when sent in an EDR.
5. Update CalSAWS pages to display both the CalSAWS and CalHEERS Person Numbers and update references to 'MEDS PN' in the MAGI pages to read 'CalSAWS PN'.

1.3 Overview of Recommendations

1. CalSAWS will no longer prevent a user from linking a MAGI Referral to a CalSAWS case that had prior linkage to a different MAGI Case during the MAGI Referral Linking flow.

   When the Automatic MAGI Case Search is turned on and the user has the new MAGIReferralRelinkMAGICase security right, the system will now automatically perform a MAGI Case Search and allow the user to update the linkage if the Search Results confirm that the already linked MAGI Case has no ongoing or Pending MAGI Medi-Cal in CalHEERS, the COR is released (or is same county), and there is no actively linked SAWS case.

   When the Automatic MAGI Case Search is turned off, a user with MAGIReferralRelinkMAGICase security right can still update the MAGI linkage, but they are required to perform the MAGI Case Search manually (outside the MAGI Referral Linking flow).

   CalSAWS will prevent the user from linking a MAGI Referral if the existing MAGI Case has ongoing or Pending MAGI Medi-Cal Eligibility, the COR is not in the same county or if there is an actively linked SAWS case, or if the user does not have the new MAGIReferralRelinkMAGICase security right.

   The Previous Case List page will also now display the MAGI Case Number from the MAGI Referral and the MAGI Case Number(s) already linked to previous CalSAWS cases.

2. CalSAWS will now allow a user to link a MAGI Referral to a CalSAWS case that had prior linkage to a different MAGI Case during the MAGI Referral Linking flow. The MAGI Case Linkage Update Confirmation List page will present the current linkage and the new linkage to the user for confirmation. The page will warn the user if the MAGI Case Search results were invalid and the system was unable to determine if the MAGI Case has ongoing or Pending MAGI Medi-Cal Eligibility, and if CalHEERS released the COR and the actively linked SAWS case.
3. CalSAWS sends an Inter-County Transfer Indicator as 'Yes' in an EDR and will now display the 'Inter-County Transfer' = Yes to the user on the MAGI Request Detail page. The MAGI Request Detail page will also now display the CalHEERS Person Number and the 'Update PN' field when the Person Association is updated. The 'MEDS PN' label will be updated to display as 'CalSAWS PN'.
4. CalSAWS will now display the CalSAWS and CalHEERS Person Numbers on the MAGI Referral Detail page.
5. The MAGI Person Detail page shows the CalHEERS Admin information about a person in an EDR and DER. The section will now include 'CalSAWS Person Number' sent in an EDR or received in a DER, and the 'Update Person Association' sent in an EDR.
6. The Person Association List page shows the CalSAWS Person Number as 'MEDS PN'. The label will be updated to display as 'CalSAWS PN'.
7. The MAGI Disposition Detail page will now show the 'CalHEERS PN', and the 'MEDS PN' column is relabeled to 'CalSAWS PN'.

1.4 Assumptions

1. Counties will add the 'MAGI Referral Relink MAGI Case' '~~MAGI Case Search Automation'~~ Security Group to selected individuals/positions; this will not be part of the MAGI Edit Security Group.
2. Future SCR CA-261924 will enhance CalSAWS with additional functionality to allow more flexibility to help the user update COR in CalHEERS from within CalSAWS, and to manually set the ICT indicator and the SAWS Person Association Override Ind in an EDR. The SCR is currently targeted for release 25.02.

2 RECOMMENDATIONS

2.1 Previous Case List Page

2.1.1 Overview

CalSAWS will no longer prevent a user from linking a MAGI Referral to a CalSAWS case that had prior linkage to a different MAGI Case during the MAGI Referral Linking flow.

When the Automatic MAGI Case Search is turned on and the user has the new MAGIReferralRelinkMAGICase security right, the system will now automatically perform a MAGI Case Search and allow the user to update the linkage if the Search Results confirm that the already linked MAGI Case has no ongoing or Pending MAGI Medi-Cal in CalHEERS, the COR is released (or is same county), and there is no actively linked SAWS case.

When the Automatic MAGI Case Search is turned off, a user with MAGIReferralRelinkMAGICase security right can still update the MAGI linkage, but they are required to perform the MAGI Case Search manually (outside the MAGI Referral Linking flow).

CalSAWS will prevent the user from linking a MAGI Referral if the existing MAGI Case has ongoing or Pending MAGI Medi-Cal Eligibility, the COR is not in the same county or if there is an actively linked SAWS case, or if the user does not have the new MAGIReferralRelinkMAGICase security right.

The Previous Case List page will also now display the MAGI Case Number from the MAGI Referral and the MAGI Case Number(s) already linked to previous CalSAWS cases.

2.1.2 Previous Case List Mockup

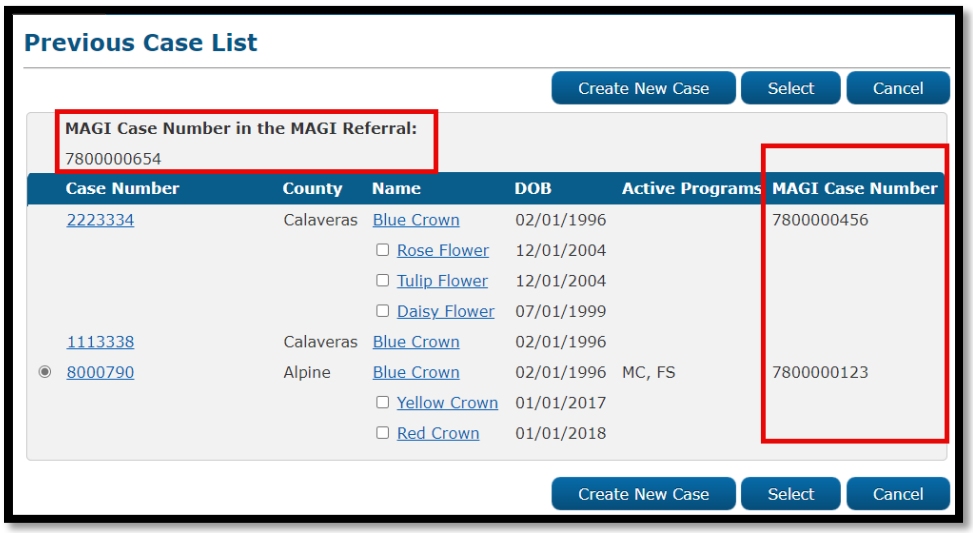


Figure 2.1.2.1- Previous Case List

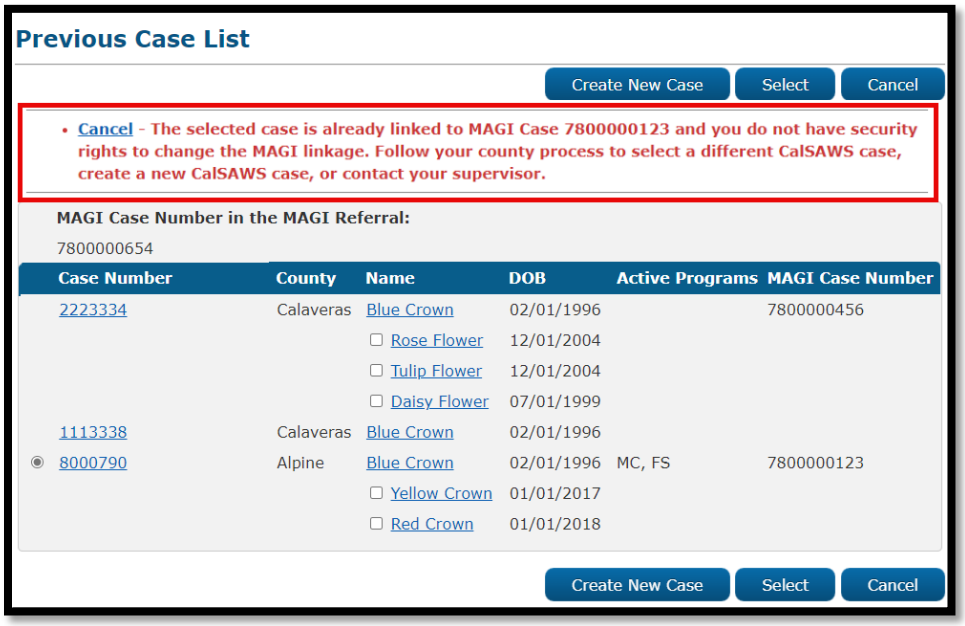


Figure 2.1.2.2- Previous Case List with Updated Validation Message to Prevent Relinking to a New MAGI Case. This is applicable for a user without 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ Security Right.

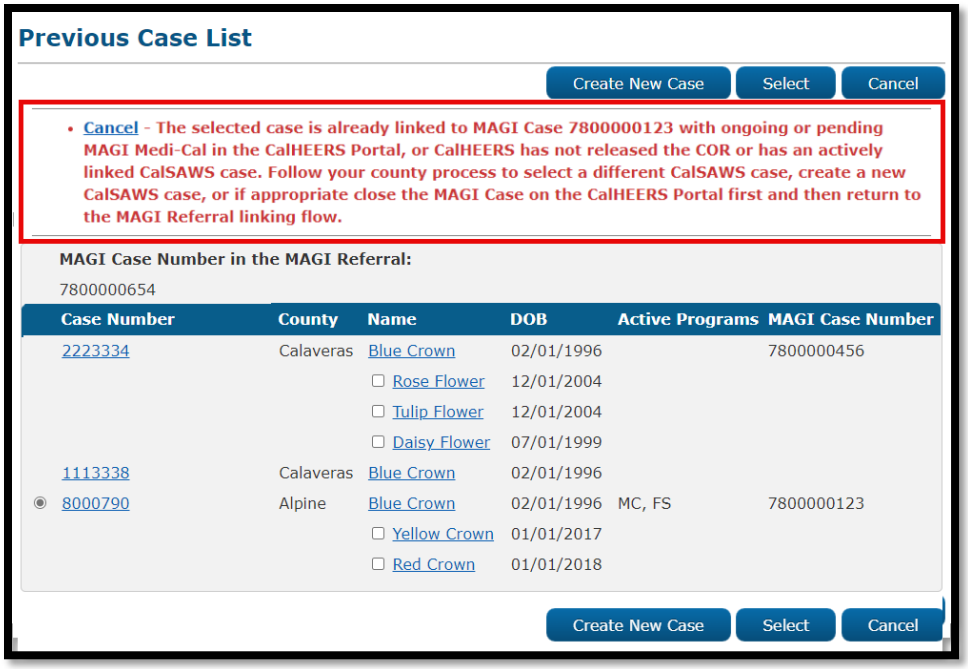


Figure 2.1.2.3- Previous Case List Page with Validation Message that the Selected CalSAWS Case Cannot be Relinked to a New MAGI Case based on the Automatic MAGI Case Search Response Results. This is only applicable for a user with 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ Security Right.

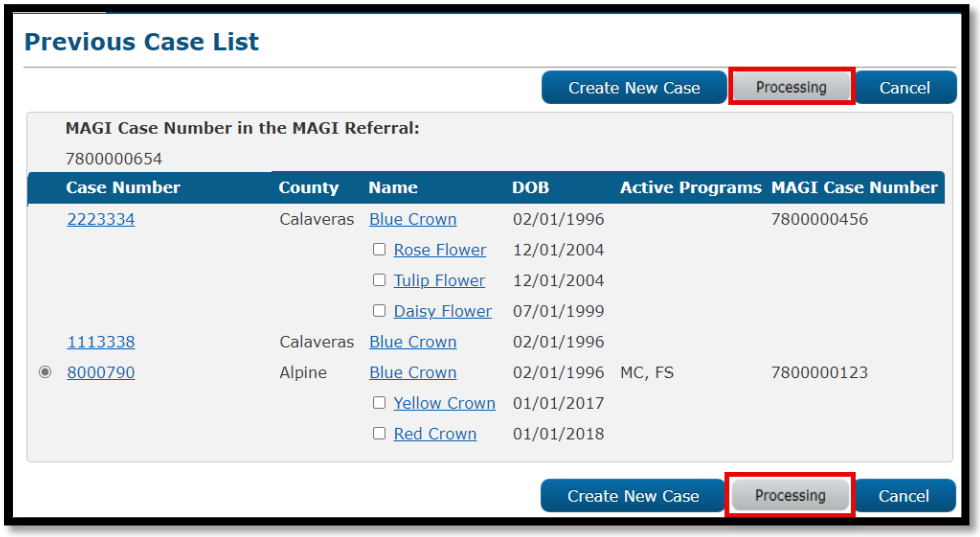


Figure 2.1.2.4 – Previous Case List Page with "Processing" Button when the Automated MAGI Case Search Response is Not Received. This is only applicable for a user with 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ Security Right.

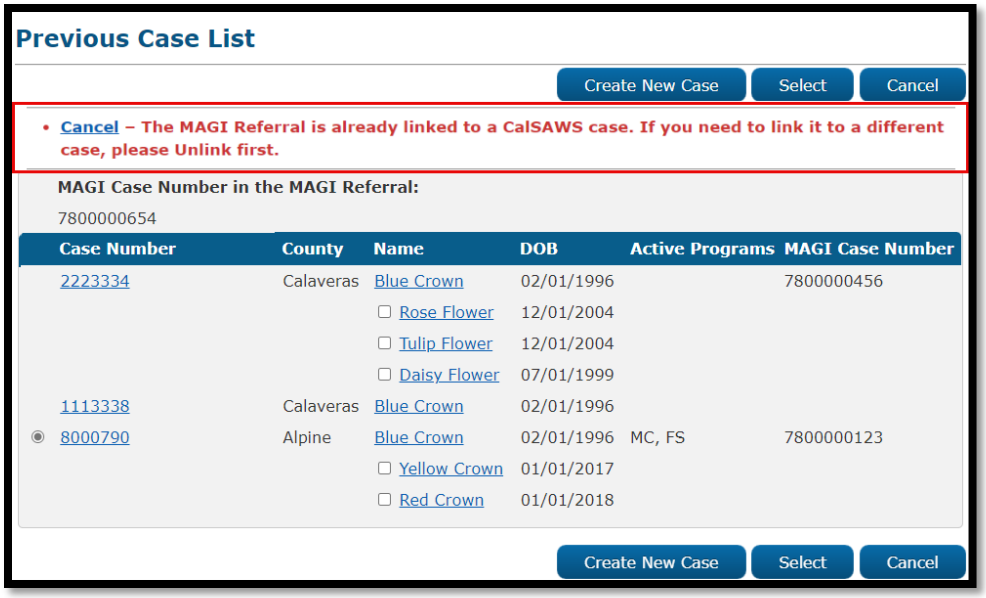


Figure 2.1.2.5 – Previous Case List Page with Validation Message that the MAGI Referral is already linked to a CalSAWS case.

2.1.3 Description of Changes

1. Update 'Previous Case List' page when accessed from the MAGI Referral Linking flow to display the MAGI Case Number from the MAGI Referral and the MAGI Case Number linked to the CalSAWS case (if any) as follows:
    a. Add a new display-only field named, 'MAGI Case Number in the MAGI Referral:' in the unnamed section above the list of cases.
        i. Display the MAGI Case Number value from the MAGI Referral from which the user initiated the linking flow.
    b. Add a new column in the Case Number list to the right of the 'Active Programs' column, named "MAGI Case Number"
        i. Display the MAGI Case Number value based on the last known MAGI case linkage for the CalSAWS case (CH_VALID_DER).
2. Add a security right 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ to be part of new security group, ~~'MAGI Case Search Automation'~~ 'MAGI Referral Relink MAGI Case'. The new security right will allow the system to initiate an automated MAGI Case Search (Recommendation 2.1.3.4) when the user with this right arrives to the 'Previous Case List' page from the MAGI Referral linking flow and the Automatic MAGI Case Search functionality is turned on. If the user with this right arrives to the 'Previous Case List' page and the Automatic MAGI Case Search functionality is turned off, the user may select a CalSAWS case with prior linkage and will be presented with a Page Warning in Recommendation 2.2.3.3.

If the user does not have this security right, the system will not initiate an Automatic MAGI Case Search (when turned on) and will prevent the user from selecting a CalSAWS case with prior linkage to a different MAGI Case with the Page Validation in Recommendation 2.1.3.3.

3. Update the existing Page Validation on the 'Previous Case List' page as follows (Figure 2.1.2.2):
   Current Text: 'Form Error - The selected case is already linked to CalHEERS Case <Current MAGI Case Number>. Please select a different case or create a new one.'
   Current Criteria: The selected CalSAWS case is already linked to a different MAGI Case than what is in the MAGI Referral and the user clicked the 'Select' button in the MAGI Referral Linking flow.
   Current Functionality: On click of the 'Select' button if the criteria is met, this is a hard page validation and the user cannot select the case for linkage.
   Updated Text: 'Cancel - The selected case is already linked to MAGI Case <Current MAGI Case Number> and you do not have security rights to change the MAGI linkage. Follow your county process to select a different CalSAWS case, create a new CalSAWS case, or contact your supervisor.'
   Updated Criteria: The selected CalSAWS case is already linked to a different MAGI Case than what is in the MAGI Referral, the user clicked the 'Select' button in the MAGI Referral Linking flow and the user does not have the 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ security right.
   Updated Functionality: On click of the 'Select' button if the criteria is met, this is a hard page validation and the user cannot select the case for linkage.
4. Add functionality to perform an Automatic MAGI Case Search that is configurable to be turned on or off by a CTCR. The parameters for the Automatic MAGI Case Search are in Recommendation 2.1.3.5 below. The Automatic MAGI Case Search functionality will be implemented turned off with the release of this SCR. The Automatic MAGI Case Search functionality will be turned on with future SCR CA-282201.
5. Update the 'Previous Case List' page to automatically kick-off a MAGI Case Search in the background if the user has Security Right 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~, the Automatic MAGI Case Search functionality is turned on, and there is at least one CalSAWS case in the same county with existing linkage to a MAGI Case.
   ~~a. Clear any prior MAGI Case Search Responses, if any.~~
   b. Send an automatic MAGI Case Search Request for any MAGI Case with existing linkage to a CalSAWS case in the same county as the logged-in county.
      Also send an automatic MAGI Case Search Request for the MAGI Case in the MAGI Referral.

Send the MAGI Case Search Requests with the 'Search By' = "MAGI Case Number" and 'Benefit Month' = <Come-up Month>.
If the user reenters the MAGI Referral Linking flow again (for the same MAGI Referral/Case or for a different MAGI Referral/Case), the system will perform a new automatic MAGI Case Search Request.

c. Send a maximum of 20 MAGI Case Searches. If there are more than 19 previously linked MAGI Cases in the logged-in county, do not send any MAGI Case Searches and instead navigate the user to the 'MAGI Case Linkage Update Confirmation List' page with a Page Warning message in Recommendation 2.2.3.3.

6. When the user with 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ security right selects a CalSAWS case that has existing linkage to a different MAGI Case Number than what is in the MAGI Referral, and the user clicks the 'Select' button, check if the Automatic MAGI Case Search is turned on and successful MAGI Case Search Responses are returned for both the existing linked MAGI Case and the MAGI Case in the MAGI Referral.
   a. If the Automatic MAGI Case Search is turned off, then proceed to the MAGI Case Linkage Update Confirmation List Page with Warning Message in Recommendation 2.2.3.3.
   b. If the Automatic MAGI Case Search is turned on and both responses are returned ~~yes~~, then proceed to Recommendation 2.1.3.7 to evaluate the responses.
   c. If the Automatic MAGI Case Search is turned on, but both responses are not yet returned ~~no~~, change the 'Select' button to a greyed out 'Processing' button as shown in Figure 2.1.2.4 until any combination of the following occurs for both the existing MAGI Case and the MAGI Case in the MAGI Referral:
      i. The MAGI Case Search Response returned successfully, or
      ii. The MAGI Case Search returns an error, or
      iii. 32 seconds elapsed since the automated MAGI Case Search Request was sent

      Then proceed to Recommendation 2.1.3.7 to evaluate the MAGI Case Search Response results.

7. Evaluate the MAGI Search Response Results for the existing MAGI Case linked to the selected CalSAWS case as follows:

Response	Search Results	Next Step
OK to update linkage	When all the following are true: 1. No person in the MAGI Case Search Response has 'Pending', 'Eligible' or 'Conditionally Eligible' MAGI Medi-Cal Eligibility Status, and 2. the MAGI Case Search Response COR is either blank or is set to the same county as the logged-in county, and 3. the MAGI Case Search Response has either no actively linked SAWS Case/County, or the actively linked SAWS Case/County is same as the selected CalSAWS Case/County	Navigate the user to the 'MAGI Case Linkage Update Confirmation List' page in Rec 2.2.3.1
Page warning message but allow relinking	When either of the following is true: 1. The MAGI Case Search returns an error, or 2. 32 seconds elapsed since the automated MAGI Case Search Request was sent	Navigate the user to the 'MAGI Case Linkage Update Confirmation List' page with a Page Warning message in Rec 2.2.3.3
Page Validation to prevent linkage	When any of the following are true: 1. At least one person in the MAGI Case Search Response has 'Pending', 'Eligible' or 'Conditionally Eligible' MAGI Medi-Cal Eligibility Status, or 2. the MAGI Case Search Response COR is set to another county, or 3. the MAGI Case Search Response has an actively linked SAWS Case/County that is not the same as the selected SAWS Case/County	Present the user with the updated page validation in Rec 2.1.3.8

8. Add a Page Validation on the 'Previous Case List' page as follows:
   Validation Text: 'Cancel - The selected case is already linked to MAGI Case <Current MAGI Case Number> with ongoing or pending MAGI Medi-Cal in the CalHEERS Portal, or CalHEERS has not released the COR or has an actively linked CalSAWS case. Follow your county process to select a different CalSAWS case, create a new CalSAWS case, or if appropriate close the MAGI Case on the CalHEERS Portal first and then return to the MAGI Referral linking flow.'
   Criteria: The selected CalSAWS case is already linked to a different MAGI Case than what is in the MAGI Referral and the user with 'MAGIReferralRelinkMAGICase' ~~'MAGICaseSearchAutomation'~~ Security Right clicked the 'Select' button in the MAGI Referral Linking flow.

   Based on the MAGI Case Response for the existing MAGI Case, all of the following are true:
   - at least one person in the MAGI Case Search Response has 'Pending', 'Eligible' or 'Conditionally Eligible' MAGI Medi-Cal Eligibility Status,
     or
   - the MAGI Case Search Response COR is set to another county,
     or
   - the MAGI Case Search Response has an actively linked SAWS Case/County that is not the same as the selected SAWS Case/County.

   Functionality: Per Recommendation 2.1.3.5, on click of the 'Select' button, the system will perform an automatic MAGI Case Search. Based on the MAGI Case Search Response result in Recommendation 2.1.3.7, the page may display this Page validation text. This is a hard validation, and the user cannot select the case for linkage.
   When the user clicks the 'Cancel' hyperlink, redirect the focus to the 'Cancel' button.
9. ~~If the user completes the linkage by selecting a CalSAWS case that does not already have a MAGI Case associated, or clicks 'Create New Case', clear the responses (if any) from the automatic MAGI Case Search requests.~~
10. If the user exits the MAGI Referral Linking flow with or without completing the linkage to a CalSAWS case ~~or clicking 'Cancel'~~, clear the responses (if any) from the automatic MAGI Case Search requests after 10 minutes.
    For example: If the user is on the 'Previous Case List' page and navigates to Case Summary→e-Tools→MAGI Referrals. This will take the user to the MAGI Referral Search page and the user exits the MAGI Referral Linking flow. The automatic MAGI Case Search responses will be cleared after 10 minutes.

Note: If the session times out while on the 'Previous Case List' page or the session ends for any reason, the responses (if any) from the automatic MAGI Case Search requests are automatically cleared.

11. If the user followed the MAGI Referral linking flow, linked a CalSAWS Case, arrived to the 'Case Members List' page and instead of completing the MAGI Referral Linking flow, the user then navigates back to the 'Previous Case List' page by using the browser 'Back' button, display the following Page Validation if the user tries to select or create a new CalSAWS Case. Shown in Figure 2.1.2.5.

    Validation Text: 'Cancel – The MAGI Referral is already linked to a CalSAWS case. If you need to link it to a different case, please Unlink first.'

    Criteria: The MAGI Referral is already linked to a different CalSAWS case when the user clicked either the 'Select' button or 'Create New Case' button on the Previous Case List page in the MAGI Referral Linking flow.

    NOTE: Users should not use the browser 'Back' button and using the browser 'Back' button is not supported by CalSAWS; however, since the user taking these navigation steps could cause bad data, the Page Validation will prevent the MAGI Referral from attempting to link twice.

2.1.4 Page Location

- **Global:** Case Summary
- **Local:** e-Tools
- **Task:** MAGI Referrals→Initiated Date→Click [Link to Case] and follow the linking flow until 'Previous Case List' page.

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGIReferralRelink MAGICase ~~MAGICaseSearchAutomation~~	~~This right allows the system to perform an automatic MAGI Case Search when the user arrives at the Previous Case List page in the MAGI Referral Linking Flow.~~ This right allows users to update the	MAGI Referral Relink MAGI Case ~~MAGI CaseSearch~~

	MAGI Case linkage for the selected CalSAWS Case to the MAGI Case in the MAGI Referral.	~~Automatio n~~

2. Security Groups

Security Group	Group Description	Group to Role Mapping
MAGI Referral Relink MAGI Case ~~MAGI Case Search Automation~~	This group ~~allows the system to perform an automatic MAGI Case Search when the user arrives at the Previous Case List page in the MAGI Referral Linking Flow, and~~ allows the user to relink the MAGI Case if appropriate.	System Admin

2.1.6 Page Mapping

No Change

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

When the Automatic MAGI Case Search is turned on, estimated to be 310 automatic MAGI Case Searches per day with a high during open enrollment to be no more than 1,150/day.

2.2 MAGI Case Linkage Update Confirmation List Page

2.2.1 Overview

CalSAWS will now allow a user to link a MAGI Referral to a CalSAWS case that had prior linkage to a different MAGI Case during the MAGI Referral Linking flow. The MAGI Case Linkage Update Confirmation List page will present the current linkage and the new linkage to the user for confirmation. The page will warn the user if the MAGI Case Search results were invalid and the system was unable to determine if the MAGI Case has ongoing or Pending MAGI Medi-Cal Eligibility, and if CalHEERS released the COR and the actively linked SAWS case.

2.2.2 MAGI Case Linkage Update Confirmation List Mockup

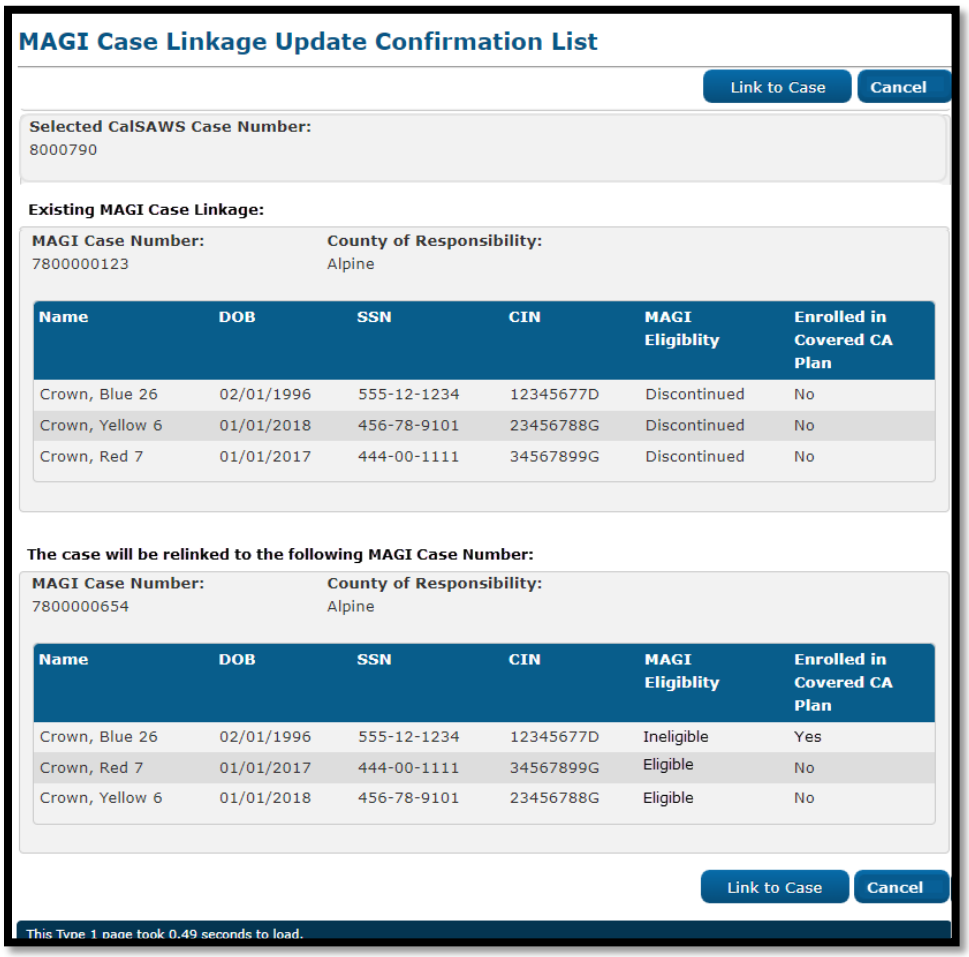


Figure 2.2.2.1 – MAGI Case Linkage Update Confirmation List page

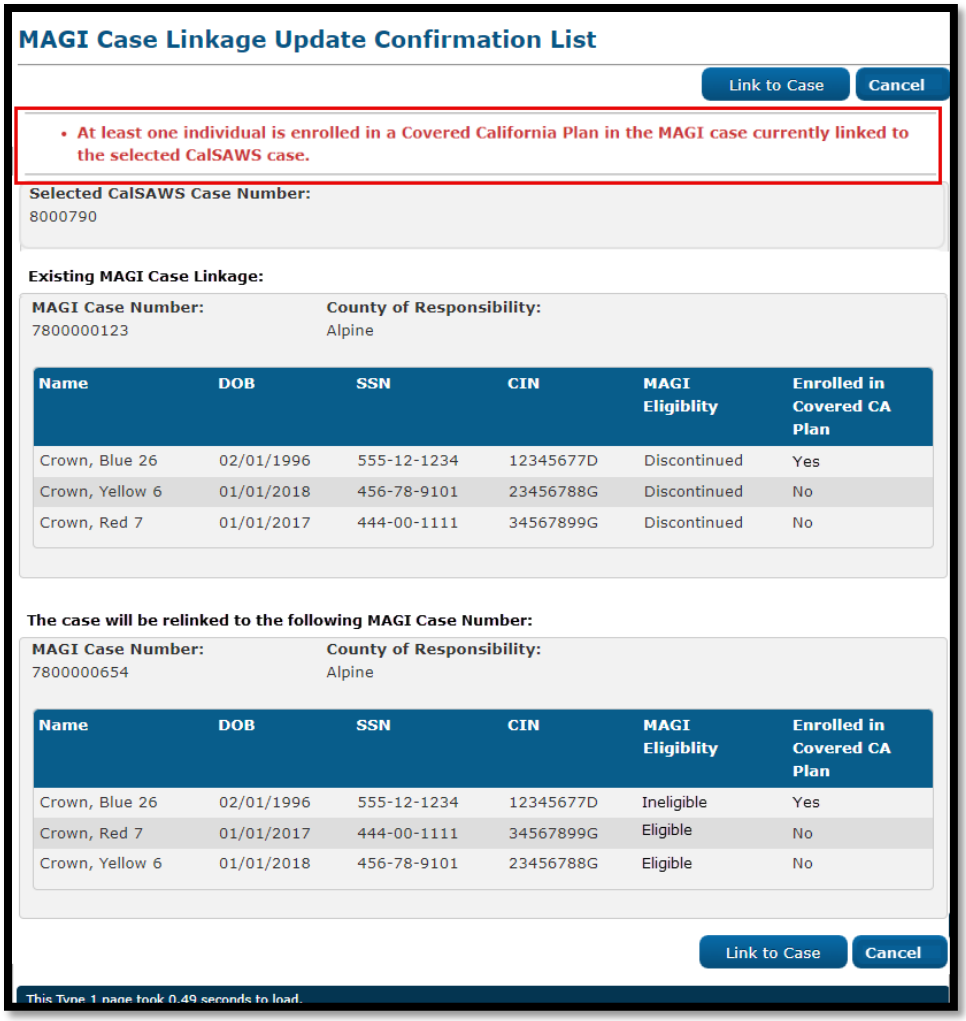


Figure 2.2.2.2 – MAGI Case Linkage Update Confirmation List page with Warning Message that Existing MAGI Case has at Least One Individual Enrolled in a Covered California Plan

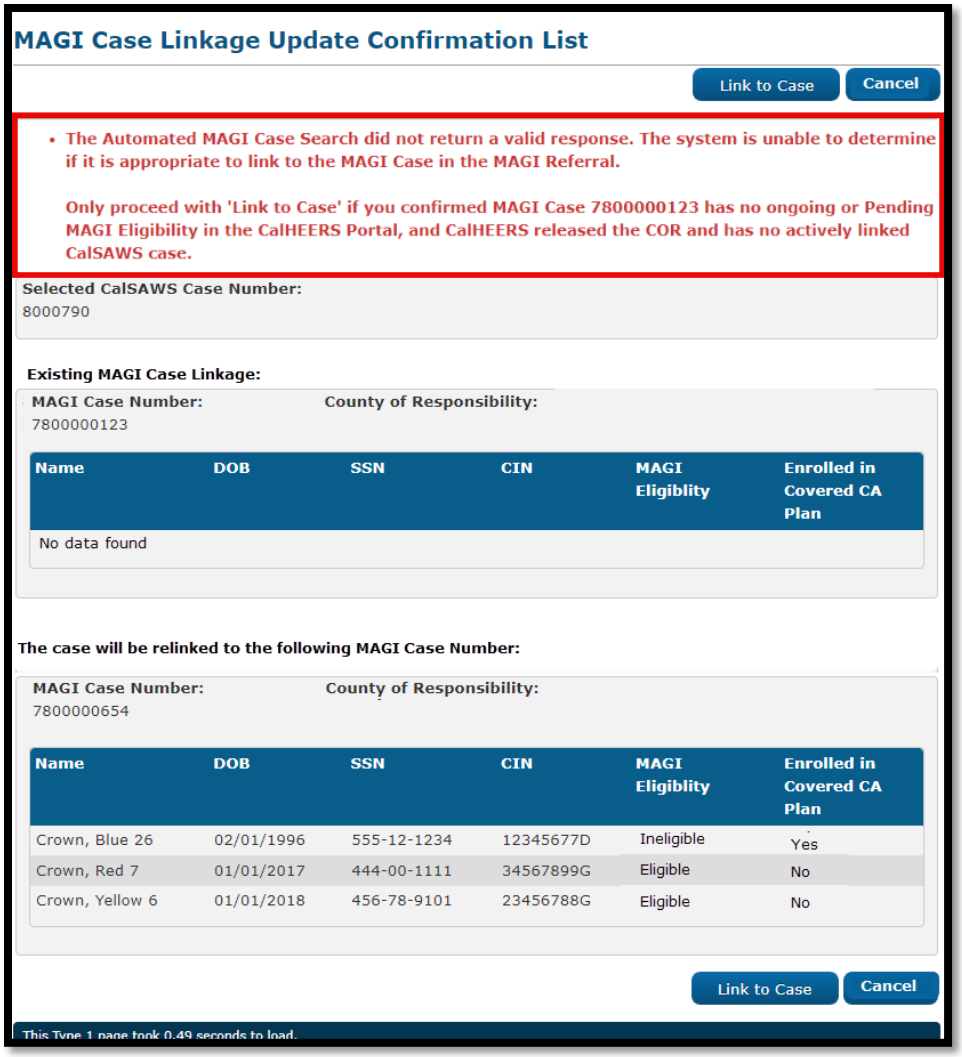


Figure 2.2.2.3 – MAGI Case Linkage Update Confirmation List Page Warning Message with Response only from MAGI Case in MAGI Referral

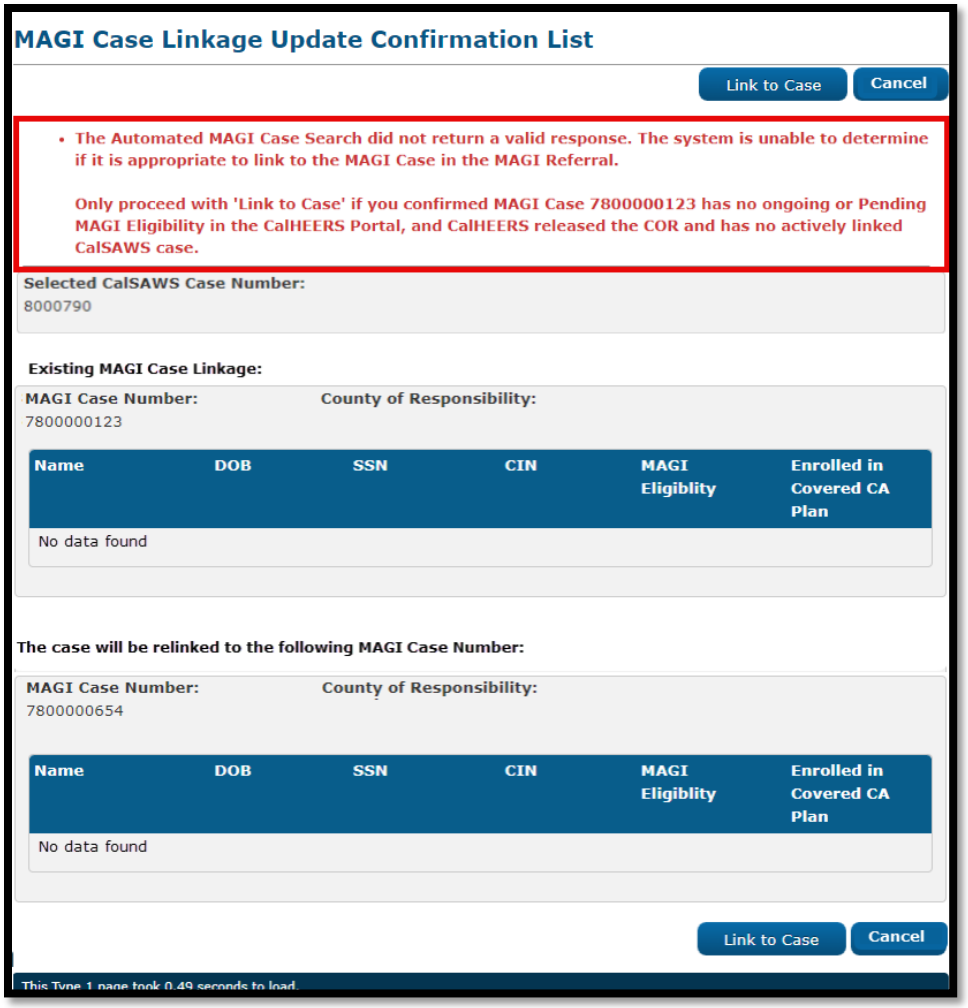


Figure 2.2.2.4 – MAGI Case Linkage Update Confirmation List page with Warning Message and no MAGI Case Search Response for either MAGI Case

2.2.3 Description of Changes

1. Add a new page named, "MAGI Case Linkage Update Confirmation List" that displays the current CalSAWS Case and the MAGI Case information for the user to confirm the linkage update as displayed in Figure 2.2.2.1.
    a. The first section of the page displays the selected CalSAWS Case.
        i. **Selected CalSAWS Case Number:** Display the CalSAWS Case Number selected in the 'Previous Case List' in the MAGI Referral linking flow.
    b. The second section of the page is a static label 'Existing MAGI Case Linkage:'

c. The third section displays information about the existing linked MAGI Case.
    i. The unnamed section will display the following fields:
        1. **MAGI Case Number:** Display the existing linked MAGI Case Number.
        2. **County of Responsibility:** Display the County of Responsibility from the MAGI Case Search response for the existing linked MAGI Case. If there is either no MAGI Case Response, or no COR is received in the MAGI Case Search response, display blank as shown in Figures 2.2.2.3 and 2.2.2.4.
    ii. Add a table to display the person information received in the MAGI Case Search Response. The table will display the following columns:
        1. **Name:** The Name and age (in years) of the person. Display in the format of 'Last Name, First Name Age'.
           Note: Gender is not provided in the MAGI Case Search Response so 'Name' will not display with the standard CalSAWS format (Last Name, First Name AgeGender).
        2. **DOB:** The Date of Birth of the person in MM/DD/YYYY format.
        3. **CIN:** The Client Index Number of the person.
        4. **SSN:** The Social Security Number of the person.
        5. **MAGI Eligibility:** The MAGI Eligibility Status of the person.
        6. **Enrolled in Covered CA Plan:** The value for the 'Active Enrollment' of the person.

        If there is no valid MAGI Case Response display 'No data found' for the table as shown in Figure 2.2.2.4.
d. The fourth section of the page is a static label 'The case will be linked to the following MAGI Case Number:'
e. The fifth section of the page displays the information about the MAGI Case in the MAGI Referral.
    i. The unnamed section will display the following fields:
        1. **Selected CalSAWS Case Number:** Display the CalSAWS Case Number selected in the Previous Case List in the MAGI Referral linking flow.
        2. **MAGI Case Number:** Display the MAGI Case Number from the MAGI Referral.

3. **County of Responsibility:** Display the County of Responsibility from the MAGI Case Search response for the MAGI Case in the MAGI Referral. If there is either no MAGI Case Response, or no COR is received in the MAGI Case Search response, display blank as shown in Figures 2.2.2.3 and 2.2.2.4.

ii. Add a table to display the person information received in the MAGI Case Search Response. The table will display the following columns:
    1. **Name:** The Name and age (in years) of the person. Display in the format of 'Last Name, First Name Age'.
       Note: Gender is not provided in the MAGI Case Search Response so 'Name' will not display with the standard CalSAWS format (Last Name, First Name AgeGender).
    2. **DOB:** The Date of Birth of the person in MM/DD/YYYY format.
    3. **CIN:** The Client Index Number of the person.
    4. **SSN:** The Social Security Number of the person.
    5. **MAGI Eligibility:** The MAGI Eligibility Status of the person.
    6. **Enrolled in Covered CA Plan:** The value for the 'Active Enrollment' of the person.

    If there is no valid MAGI Case Response display 'No data found' for the table as shown in Figure 2.2.2.4.

f. Add a 'Link to Case' button to the top and bottom of the page. On click of the 'Link to Case' button, navigate the user to the 'Case Member List' page in the MAGI Referral Linking Flow and link the MAGI Referral to the selected CalSAWS case. Clear all results from the automatic MAGI Case Searches.

   Note: When there is only one person in the MAGI Referral, the next page is 'Case Member List' with "Save and Continue" button. When there is more than one person in the MAGI Referral, the next page is 'Case Member List' with "Add Person" and "Save and Continue" buttons.

g. Add a 'Cancel' button to the top and bottom of the page. On click of the 'Cancel' button, navigate the user to the 'Previous Case List' page in the MAGI Referral Linking Flow with no CalSAWS case selected.

2. Add a page warning at the top of the page with the following text when the MAGI Case Search Results were successful and the system will allow relinking to the new MAGI Case in the MAGI Referral, but at least one individual in the existing MAGI Case has Active Enrollment in a Covered California Plan = Yes as shown in Figure 2.2.2.2.
   Warning Text: At least one individual is enrolled in a Covered California Plan in the MAGI case currently linked to the selected CalSAWS case.

   Note: This is a soft validation and will allow the user to click the 'Link to Case' button and move forward with the updated linkage.
3. Add a page warning at the top of the page with the following text when the MAGI Case Search Results errored out or did not get a response for the existing MAGI Case as shown in Figures 2.2.2.3 and 2.2.2.4.
   Warning Text: The Automated MAGI Case Search did not return a valid response. The system is unable to determine if it is appropriate to link to the MAGI Case in the MAGI Referral.

   Only proceed with 'Link to Case' if you confirmed MAGI Case <Existing linked MAGI Case> has no ongoing or Pending MAGI Eligibility in the CalHEERS Portal, and CalHEERS released the COR and has no actively linked CalSAWS case.

   Note: This is a soft validation and will allow the user to click the 'Link to Case' button and move forward with the updated linkage.

   As a reminder: CalSAWS allows a user to 'Unlink' a CalSAWS case from a MAGI Referral as long as the MAGI Referral Status is still 'In Process' and the CalSAWS case does not have other Referrals in 'Reviewed' or 'Completed' status that cannot be unlinked. If the user incorrectly linked the CalSAWS case to the MAGI Referral and cannot 'Unlink', the user can follow the MAGI Case Linkage override process to correct the MAGI Case linked to the CalSAWS case.

   CalHEERS Business Validations: If CalHEERS has the COR locked for the existing MAGI Case, or the CalSAWS case is still actively linked to the existing case in CalHEERS, and the user decided to relink to the MAGI Case in the MAGI Referral, the user will receive EDR Business Validation (BV) 9 when they send the first EDR from CalSAWS. If the user authorizes the eligibility in the MAGI Referral without first sending an EDR, the system will send a Disposition with the authorized Medi-Cal eligibility and CalHEERS will return Disposition BV 174.

   - BV 9: The combination of CalHEERS Case Number and SAWS Case information, SAWS Case Number, Servicing FIPS County Code, and Sending System, does not match the previously established case linkage information.

- BV 174: SAWS Case number already exist in the system with another Case Linkage

If the user receives BV 9 or BV 174, and

a. there is no ongoing or Pending MAGI eligibility in the existing MAGI case, the user should log a CalHEERS ticket and request CalHEERS to 'enable the COR' and remove the Active SAWS Case linkage from the existing MAGI Case.
b. there is ongoing or Pending MAGI eligibility in the existing MAGI case, and
    i. the user determines the MAGI case in the MAGI Referral is the appropriate MAGI case to use going forward, the user should log into the CalHEERS portal and close the existing MAGI case as Duplicate.
    ii. the user determines the existing MAGI case is the appropriate MAGI case to use going forward, the user should follow the MAGI Case Linkage override steps to relink the CalSAWS case to the existing MAGI case. Then, go into the CalHEERS portal and close the MAGI case in the MAGI Referral as Duplicate.

2.2.4 Page Location

- **Global:** Case Summary
- **Local:** e-Tools
- **Task:** MAGI Referrals→Initiated Date→Click [Link to Case] and follow the linking flow until 'Previous Case List' page. Select a CalSAWS case already linked to a different MAGI Case Number.

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
MAGIReferralRelink MAGICase ~~MAGICaseSearchAutomation~~	This right ~~allows the system to perform an automatic MAGI Case Search when the user arrives at the Previous Case List page in the MAGI Referral Linking Flow. This right~~ allows users to update the MAGI Case linkage for the selected CalSAWS Case to the MAGI Case in the MAGI Referral.	MAGI Referral Relink MAGI Case ~~MAGI Case Search Automation~~

2. Security Groups

   No Change

2.2.6 Page Mapping

Not Applicable

2.2.7 Accessibility

Not Applicable

2.2.8 Page Usage/Data Volume Impacts

Approximately 50K MAGI Referrals are received per month. The new page will be accessed for less than 10% of MAGI Referrals during the linking flow; estimated maximum of 5,000 times that the page will be accessed per month.

2.3 MAGI Request Detail Page

2.3.1 Overview

CalSAWS sends an Inter-County Transfer Indicator as 'Yes' in an EDR and will now display the 'Inter-County Transfer' = Yes to the user on the MAGI Request Detail page. The MAGI Request Detail page will also now display the CalHEERS Person Number. The 'Update PN' field when the Person Association is updated.

2.3.2 MAGI Request Detail Mockup

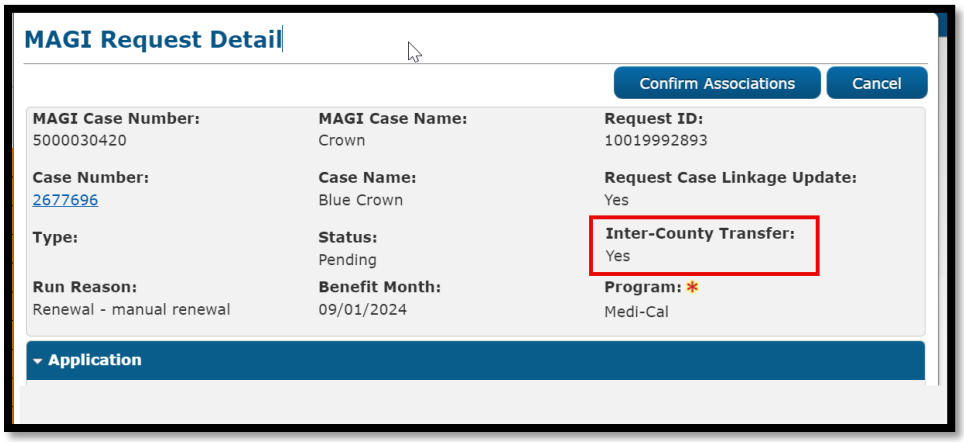


Figure 2.3.3.1 – MAGI Request Detail page showing new Inter-County Transfer field.

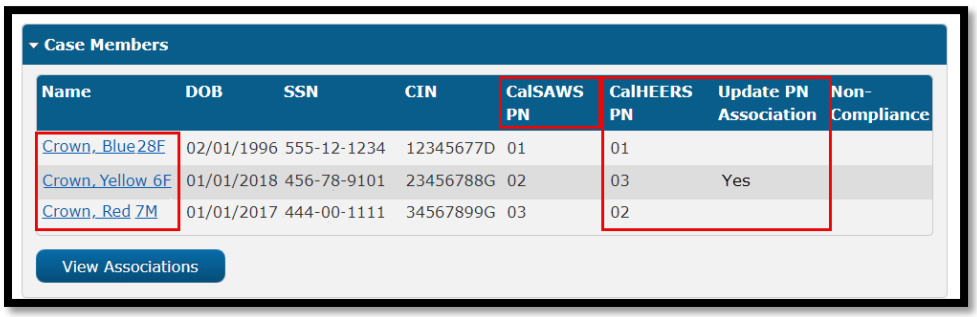


Figure 2.3.3.2 – MAGI Request Detail Page Showing Updates to Case Members Section

2.3.3 Description of Changes

1. Add a new display-only field to the MAGI Request Detail page in the unlabeled top section.
    a. **Label Name:** Inter-County Transfer:
    b. **Location:** In the third column to the right of Status, under 'Request Case Linkage Update:'. Note: 'Request Case Linkage Update:' does not always display on the page.
    c. **Value:** Populate the value based on the value in 'interCountyTransferInd' in the EDR. The value with display either 'Yes' when 'interCountyTransferInd'=Y, or blank when the 'interCountyTransferInd' is null or not sent in the EDR. 'No' will not display.
2. Update the 'Case Members' section of the MAGI Request Detail page as follows:
    a. Update the display of the name to the standard CalSAWS name format. <Last Name>, <First Name> <Age in Years><Gender>
    For example: A person with First Name, "Blue" and Last Name "Crown", instead of displaying as 'Blue Crown 28F' it will now display as 'Crown, Blue 28F'
    b. Move and relabel column heading 'MEDS PN' to 'CalSAWS PN'. The column will now be after CIN.
    c. Add a display-only column with label, 'CalHEERS PN' to the right of 'CalSAWS PN' column. The value for the field will be the 'calHEERSCasePersonNumber' from the EDR. The values can be up to two characters. When there is no 'CalHEERS PN' sent in the EDR, the field will display blank.
    d. Add a display-only column with label, 'Update PN Association' to the right of the 'CalHEERS PN' column. The value for the field will be the 'updateSAWSPersonAssociationInd' from the EDR. The value can be 'Yes' when the 'updateSAWSPersonAssociationInd'=Y or blank when the 'updateSAWSPersonAssociationInd' is null or not sent in the EDR. 'No' will not display.

2.3.4 Page Location

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [Request MAGI Button]

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [View]→Determination hyperlink→Request ID hyperlink

- **Global:** Case Summary
- **Local:** IAT Summary
- **Task:** Initiated Date hyperlink for a 'Determination Response'→Request ID hyperlink

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search→Initiated Date hyperlink for a 'Determination Response'→Request ID hyperlink

2.3.5 Security Updates

No Change

2.3.6 Page Mapping

Update Page Mapping for new label and new fields.

2.3.7 Accessibility

Not Applicable to a new page.

2.3.8 Page Usage/Data Volume Impacts

No Change

2.4 MAGI Referral Detail Page

2.4.1 Overview

CalSAWS will now display the CalSAWS and CalHEERS Person Numbers on the MAGI Referral Detail page.

2.4.2 MAGI Referral Detail Mockup

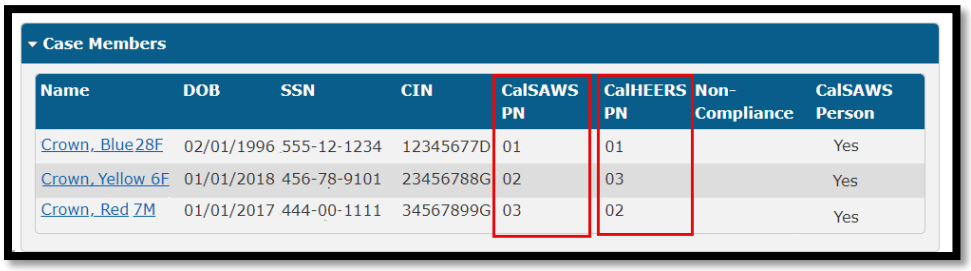


Figure 2.4.2.1 – MAGI Referral Detail Page Showing Updates to 'Case Members' Section

2.4.3 Description of Changes

1. Update the 'Case Members' section of the MAGI Referral ~~Request~~ Detail page as follows:
    a. Add a view-only column with label, ~~Move and relabel column heading 'MEDS PN' to~~ 'CalSAWS PN' to the right of ~~. The column will now be after~~ CIN. The value for the field will be the 'sAWSCasePersonNumber' from the DER. When there is no 'CalSAWS PN' sent in the DER, the field will display blank. The values can be up to two characters.
    b. Add a view-only column with label, 'CalHEERS PN' to the right of 'CalSAWS PN' column. The value for the field will be the 'calHEERSCasePersonNumber' from the DER. The values can be up to two characters.

2.4.4 Page Location

- **Global:** Case Summary
- **Local:** IAT Summary
- **Task:** Initiated Date hyperlink for a 'Determination Response'

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search→ Initiated Date hyperlink for a 'Referral', 'Determination Change', or 'Determination Response'

2.4.5 Security Updates

No Change

2.4.6 Page Mapping

Update Page Mapping for new label and new field.

2.4.7 Accessibility

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

2.4.8 Page Usage/Data Volume Impacts

No Change

2.5 MAGI Person Detail page

2.5.1 Overview

The MAGI Person Detail page shows the CalHEERS Admin information about a person in an EDR and DER. The section will now include 'CalSAWS Person Number' sent in an EDR or received in a DER, and the 'Update Person Association' sent in an EDR.

2.5.2 MAGI Person Detail Mockup

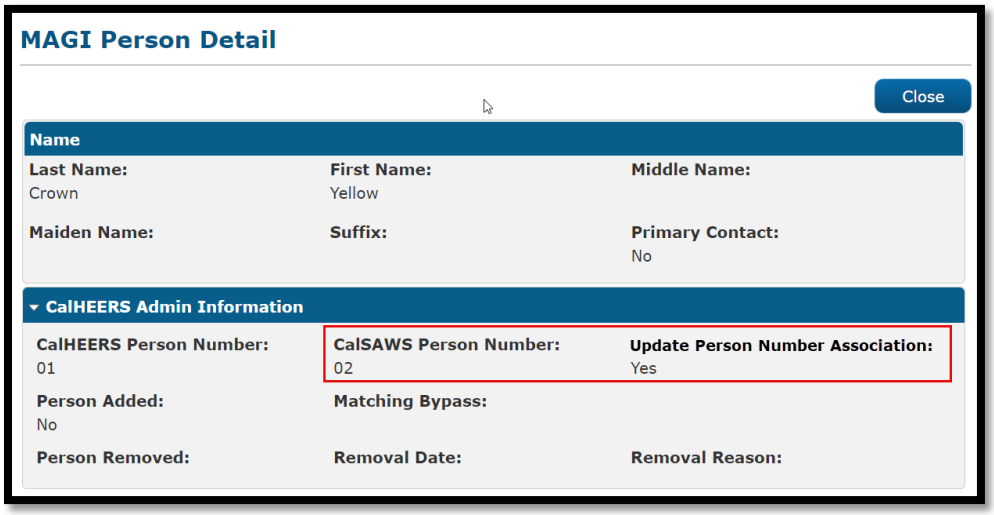


Figure 2.5.2.1 – MAGI Person Detail Mockup

2.5.3 Description of Changes

1. Update the 'CalHEERS Admin Information' section of the MAGI Person Detail page to display the 'CalSAWS Person Number' and 'Update Person Association' as follows:
    a. Insert a row below 'CalHEERS Person Number:' and 'Person Removed:'
    b. Move 'Person Added:' down one row to the newly added row, to be directly under 'CalHEERS Person Number:'.
    c. Move 'Matching Bypass:' down one row to the newly added row to be directly to the right of the new location for 'Person Added:'
    d. Add new display-only field named, 'CalSAWS Person Number:' to the right of the 'CalHEERS Person Number:' field. Display the value of 'sAWSCasePersonNumber' sent in the EDR or received in the DER. The 'CalSAWS Person Number:' is a two-character number and will always be in an EDR, but may be blank in a DER.

e. Add a new display-only field named, 'Update Person Number Association:' to the right of the new field 'CalSAWS Person Number:'. Display 'Yes' in an EDR when the updateSAWSPersonAssociationInd is sent with 'Y'; otherwise, display blank. This element is only sent from CalSAWS in an EDR and will never be received in a DER.

2.5.4 Page Location

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [Request MAGI] Button→Person Name hyperlink

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [View]→Determination hyperlink→Request ID hyperlink→Person Name hyperlink

- **Global:** Case Summary
- **Local:** IAT Summary
- **Task:** Initiated Date hyperlink for a 'Determination Response'→Request ID hyperlink→Person Name hyperlink

- **Global:** Case Summary
- **Local:** MAGI Case Search
- **Task:** Click [Link to Case] button→[Confirm Associations] button→Person Name hyperlink

2.5.5 Security Updates

No Change

2.5.6 Page Mapping

Add new fields to page mapping.

2.5.7 Accessibility

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

2.5.8 Page Usage/Data Volume Impacts

No Change

2.6 Person Association List page

2.6.1 Overview

The Person Association List page shows the CalSAWS Person Number as 'MEDS PN'. The label will be updated to display as 'CalSAWS PN'.

2.6.2 Person Association List Page Mockup

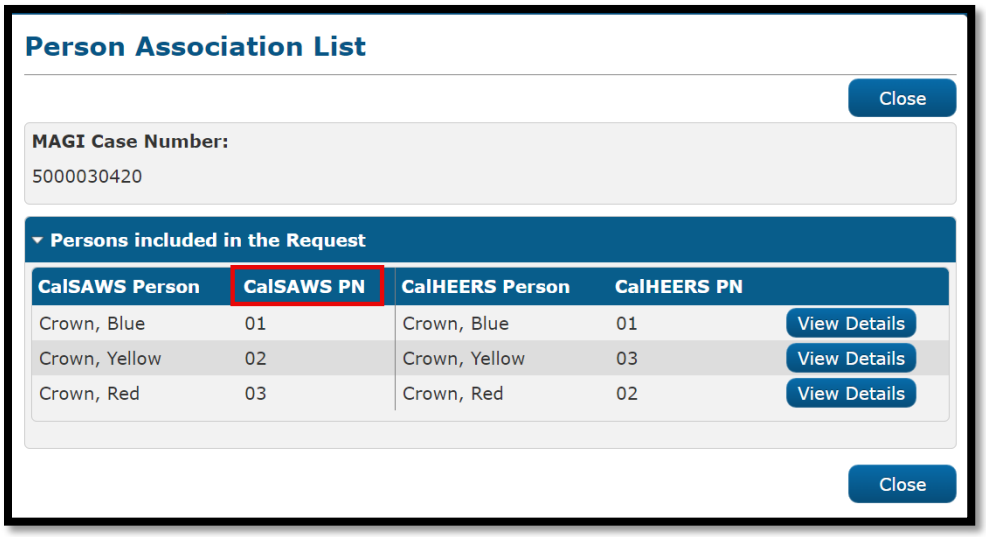


Figure 2.6.2.1 – Person Association List Page

2.6.3 Description of Changes

1. Update the 'Persons included in the Request' section of the MAGI Request Detail page as follows:
    a. Relabel column heading 'MEDS PN' to 'CalSAWS PN'.

2.6.4 Page Location

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [Request MAGI] Button→Click [Person Associations] button

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [View]→Determination hyperlink→Request ID hyperlink→Click [Person Associations] button

- **Global:** Case Summary
- **Local:** IAT Summary
- **Task:** Initiated Date hyperlink for a 'Determination Response'→Request ID hyperlink→Click [Person Associations] button

- **Global:** Case Summary
- **Local:** IAT Summary
- **Task:** Initiated Date hyperlink for a 'Determination Response'→Click [Dispositions] button→ Initiated Date hyperlink →Click [View Associations] button

- **Global:** Case Summary
- **Local:** MAGI Case Search
- **Task:** Click [Link to Case] button→Click [Confirm Associations] button

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [View]→Determination hyperlink→Complete hyperlink in EDBCs Run Against this MAGI Determination 'Disposition' column→Click [View Associations] button

2.6.5 Security Updates

No Change

2.6.6 Page Mapping

Update Page Mapping for new label and new field.

2.6.7 Accessibility

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

2.6.8 Page Usage/Data Volume Impacts

No Change

2.7 MAGI Disposition Detail page

2.7.1 Overview

The MAGI Disposition Detail page will now show the 'CalHEERS PN', and the 'MEDS PN' column is relabeled to 'CalSAWS PN'.

2.7.2 MAGI Disposition Detail Page Mockup

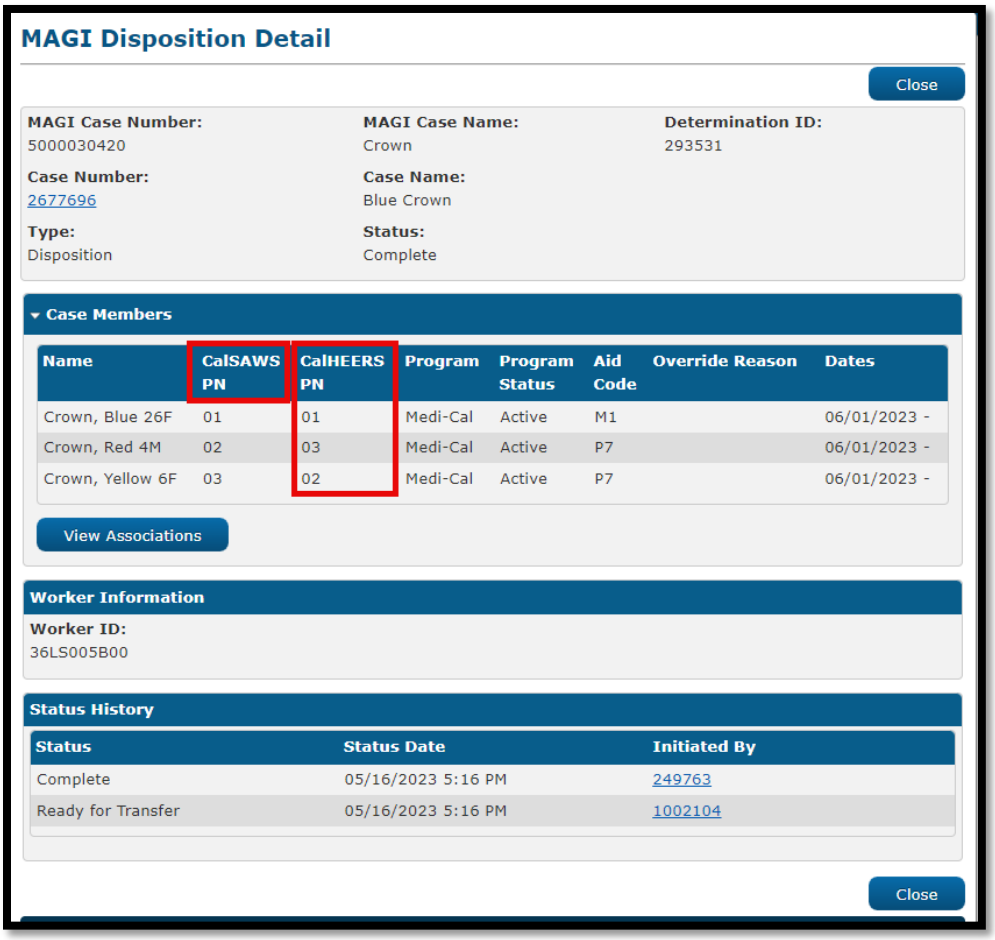


Figure 2.7.2.1 – MAGI Disposition Detail Page

2.7.3 Description of Changes

1. Update the 'Case Members' section of the MAGI Disposition Detail page as follows:
    a. Relabel column heading 'MEDS PN' to 'CalSAWS PN'.
    b. Add a view-only column with label, 'CalHEERS PN' to the right of 'CalSAWS PN' column. The value for the field will be the 'calHEERSCasePersonNumber' from the Disposition. The values can be up to two characters.

2.7.4 Page Location

- **Global:** Case Summary
- **Local:** IAT Summary
- **Task:** Initiated Date hyperlink for a 'Determination Response'→Click [Dispositions] button→ Initiated Date hyperlink

- **Global:** Customer Information
- **Local:** MAGI Eligibility
- **Task:** MAGI Determination List→Click [View]→Determination hyperlink→Complete hyperlink in EDBCs Run Against this MAGI Determination 'Disposition' column

2.7.5 Security Updates

No Change

2.7.6 Page Mapping

Update Page Mapping for new label and new field.

2.7.7 Accessibility

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

2.7.8 Page Usage/Data Volume Impacts

No Change

2.8 Automated Regression Test

2.8.1 Overview

Update existing automated regression test scripts to account for the new name format on the MAGI Request Detail page.

Create new regression scripts to verify the display of the following field labels and values:

- Previous Case List: MAGI Case Number in the MAGI Referral field; MAGI Case Number column
- MAGI Request Detail: Name column; CalSAWS PN, CalHEERS PN, Update PN columns
- MAGI Referral Detail: CalSAWS PN, CalHEERS PN columns
- MAGI Person Detail: CalSAWS Person Number field; Update Person Association field

Create new regression scripts to verify the functionality of the MAGI Case Linkage Update Confirmation List page.

2.8.2 Description of Change

1. Update existing regression scripts that utilize the 'Name' column of the MAGI Request Detail page to use the updated format.
2. Update existing scripts that utilize the 'MEDS PN' column to instead reference 'CalSAWS PN'.
   Note: A total of 2 scripts are impacted as of 7/2/24:
   a. MAGI - Refused Admin Verifications
   b. MC - MAGI Disposition Detail - Hidden Person
3. Create new regression scripts to verify the 'MAGI Case Number in the MAGI Referral' field and 'MAGI Case Number' columns display on the Previous Case List page while linking a MAGI Referral to an existing case.
4. Create new regression scripts to verify the functionality of the MAGI Case Linkage Update Confirmation List page including:
   a. Display of the current and new values
   b. 'Cancel' button returns the user to the previous page without changing the existing case linkage
   c. 'Save' button navigates the user to the next page and updates the case linkage
5. Create new regression scripts to verify the following columns display on the MAGI Request Detail page:
   a. CalSAWS PN
   b. CalHEERS PN
   c. Update PN

6. Create new regression scripts to verify the following columns display on the MAGI Referral Detail page:
    a. CalSAWS PN
    b. CalHEERS PN
7. Create new regression scripts to verify the following fields display on the MAGI Person Detail page:
    a. CalSAWS Person Number
    b. Update Person Association
8. Create / update regression scripts to verify a Page Mapping entry exists for each applicable field on the following pages:
    a. MAGI Case Linkage Update Confirmation List
    b. MAGI Person Detail
    c. MAGI Referral Detail
    d. MAGI Request Detail
    e. Person Association Detail
    f. Person Association List
    g. Previous Case List

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.9	The LRS shall display summary and detailed interface LRS Data that has been received from external systems, as specified by COUNTY.	The system will display to the user the information transmitted in the EDR or DER.

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', 'Quality Assurance Assignment' and 'External Agency Admin'.
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', 'Quality Assurance Assignment' and 'External Agency Admin'.
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

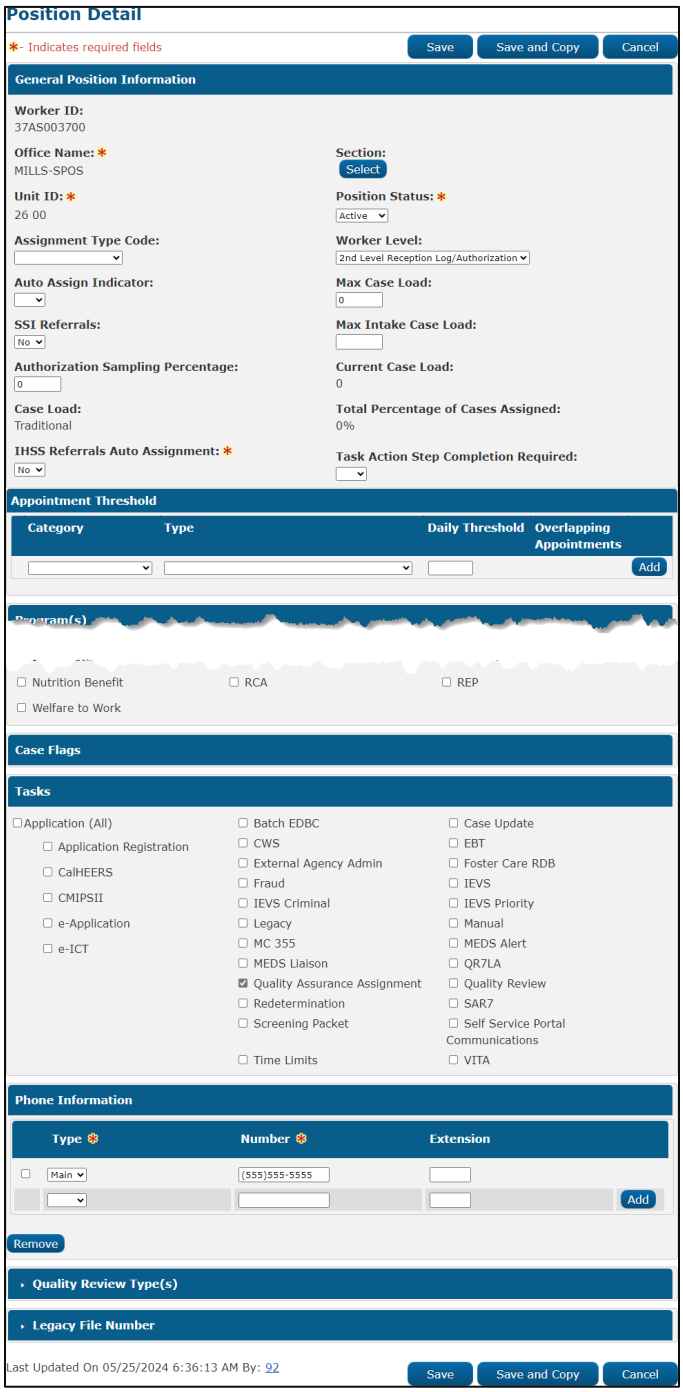

Figure 2.1.1-1 – Position Detail – Quality Assurance Assignment Task Category

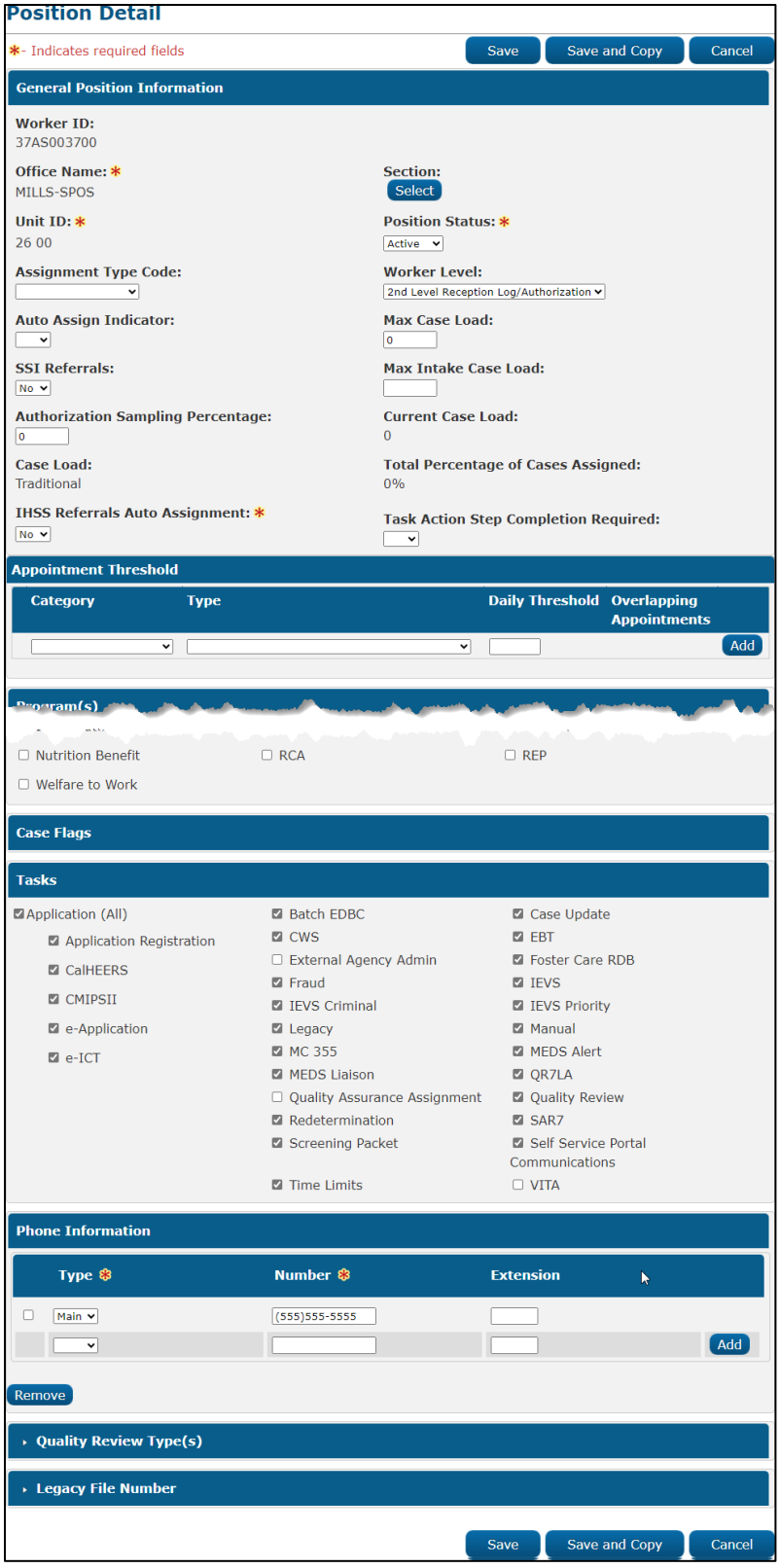

Figure 2.1.1-2 – Position Detail – All Task Categories except 'VITA', 'Quality Assurance Assignment' and 'External Agency Admin'

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
   c. External Agency Admin

   (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

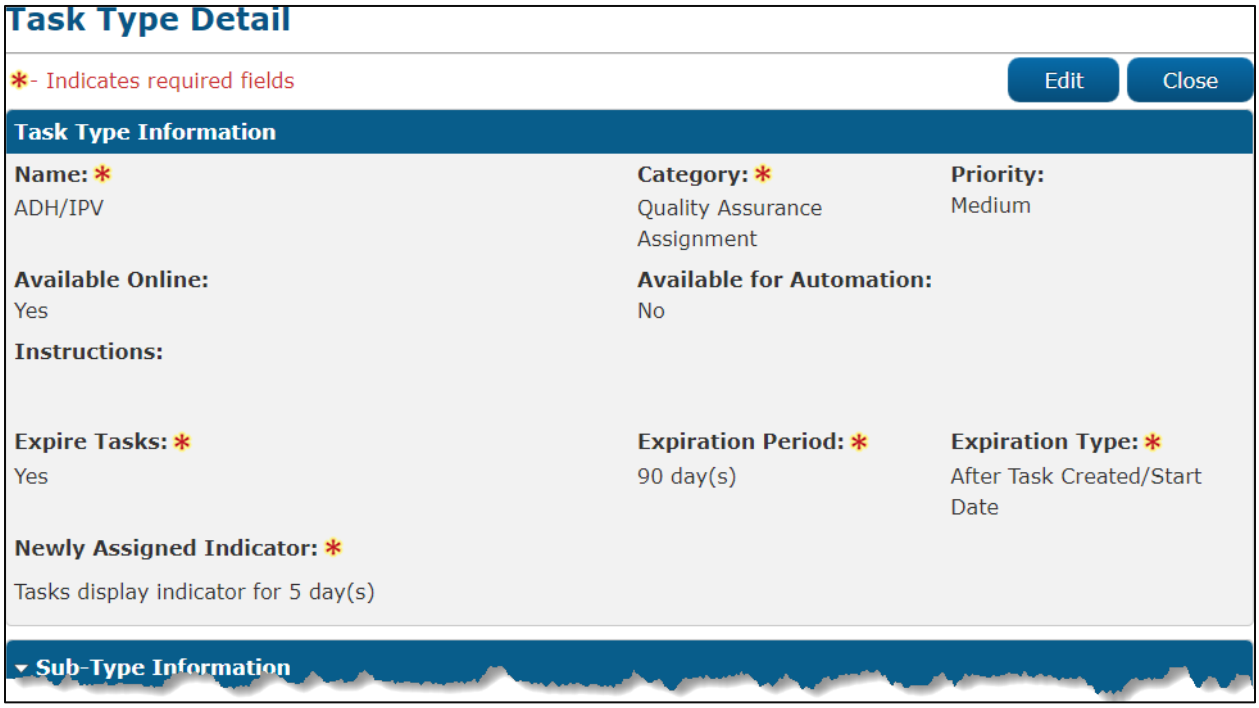

Figure 2.2.1-1 – Task Type Detail – View Mode

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	"QESD Staff" worksheet lists all Positions (Worker IDs) that is ONLY configured with the "Quality Assurance Assignment" Task Category. "FRC Staff" worksheet lists all Positions (Worker IDs) that is configured with Task Categories EXCEPT 'VITA', 'Quality Assurance Assignment' and 'External Agency Admin'.	 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', 'Quality Assurance Assignment' and 'External Agency Admin'.

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-280400

San Diego - GR COLA October 2024 - Batch EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/02/2024	1.0	Initial Draft	T. Lazio

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4.1 Batch Operations: 9

1 OVERVIEW

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

1.1 Current Design

SCR CA-277446 updated County Admin and Code Table values for the San Diego GA/GR Automated Solution program for the fiscal year beginning October 2024.

1.2 Requests

San Diego County is requesting the project run a COLA Batch EDBC to apply the new GA/GR Automated Solution program values effective October 1, 2024.

Also run Batch EDBC for 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.

1.3 Overview of Recommendations

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

1.4 Assumptions

1. A regular change NOA will be created by Batch EDBC for impacted GA/GR programs, but it will require worker action to populate the Mandatory Variable field describing the reason for the change for the NOA to be generated and mailed. This will be regression tested by Client Correspondence as part of this SCR.
2. Existing batch logic in CalSAWS skips programs with an overridden EDBC, Manual EDBC, a pending program, or a pending person.
3. Per existing exception logic, batch EDBC run on programs where the existing EDBC for the month is Read-Only will not be authorized.
4. Counties can check 'yellow banner' programs daily on the latest Qlik report.

2 RECOMMENDATIONS

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 Diego County GA/GR Automated Solution programs, and for 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 Diego 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-277446 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 for the come-up month (11/2024) for active CF and NB programs on 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

2.2 Correspondence

2.2.1 Overview

Following are the NOAs expected to be generated in the COLA run.

2.2.2 Description of Changes

CalSAWS 2-San Diego is the main change NOA which will get generated in the COLA run as mentioned in Assumptions point 1. This will be generated in 'Missing Mandatory Variables (MM)' status. Once the NOA is in MM status, the worker must fill the mandatory variable 'MAN_REASONS_FOR_AFFECTING_GRANT_AMOUNT' to allow the NOA to be generated and mailed out to the client.

Along with CalSAWS 2-San Diego, the following NOAs could also be generated in this COLA run:

090-2

948-0

W.5

CalSAWS 4-San Diego

REQUIREMENTS

2.3 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 Diego County GA/GR Automated Solution Program.

3 OUTREACH

3.1 COLA Stats Report

Generate a statistical report called 'COLA Stats Report' that summarizes the EDBC count for each program included in the COLA for SD 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'.

3.2 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[1] 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

[1] ***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.*

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". This list will include the "Shared Housing Situation" (decoded LIVING_ARRGMT.SHARE_HOUSE_SITUATN_CODE) from the active Living Arrangement record (if one exists) for the member.

   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, In-Kind Income Amount, Shared Housing Situation

The lists and COLA Stat report will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-280400

4 APPENDIX

4.1 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 Diego County:

Program	Program Count
GR	4,296
CF	4,000
NB	0
Estimated Total	**8,296**