CalSAWS

California Statewide Automated Welfare System

Design Document

CA-58236

Add Translations of Revised Forms to LRS: ABP SSI 1, ABP SSI 3, and ABP SSI 4

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Aishwarya Shankar
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/03/2024	1.0	Initial Draft	Aishwarya Shankar

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1   OVERVIEW

This SCR adds the ABPSSI-1 (07/17), ABPSSI-3 (06/2020), and ABPSSI-4 (06/2020) in provided threshold languages to CalSAWS and addresses spelling and formatting inconsistencies in the existing ABPSSI-3 (06/2020) English XDP to match the original form provided by LA County.

1.1   Current Design

The ABPSSI-1 currently exists in CalSAWS in English and is the 07/17 version. The ABPSSI-3 and ABPSSI-4 currently exist in CalSAWS in English and Spanish and are the 06/2020 versions.

1.2   Requests

Add the ABPSSI-1 (07/17) to CalSAWS in provided threshold languages. Add the ABPSSI-3 (06/2020) and ABPSSI-4 (06/2020) to CalSAWS in provided threshold languages. Address spelling and formatting inconsistencies in the existing ABPSSI-3 (06/2020) English form in CalSAWS to match the original form provided by LA County.

1.3   Overview of Recommendations

1. Add the ABPSSI-1 (07/17) to CalSAWS in the provided threshold languges: Armenian, Cambodian, Chinese, Korean, Russian, Spanish, Tagalog, and Vietnamese.
2. Add the ABPSSI-3 (06/2020) to CalSAWS in the provided threshold languages – Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, and Vietnamese.
3. Add the ABPSSI-4 (06/2020) to CalSAWS in the provided threshold languages – Vietnamese, Cambodian, Chinese, Korean, Russian, Tagalog, and Armenian.
4. Update verbiage on the existing English ABPSSI-3 (06/20) English form in CalSAWS to match the verbiage on the original form provided by LA County.

1.4   Assumptions

1. The ABPSSI-1, ABPSSI-3, and ABPSSI-4 are LA County-specific forms.
2. The ABPSSI-1 form can currently be generated through the Template Repository and batch.
3. The ABPSSI-3 form can currently be generated through the Template Repository and batch.
4. The ABPSSI-4 form can currently be generated through the Template Repository and batch.
5. There are no changes to any current functionality of these forms unless specified in the recommendation of this design document.

2   RECOMMENDATIONS

2.1   Address spelling and formatting inconsistencies on the existing ABPSSI-3 (06/2020) English form to match original form provided by LA County

2.1.1   Overview

The APBSSI-3 (06/2020) English form currently in CalSAWS has some spelling and formatting inconsistencies with the version provided by LA County. This recommendation is to fix those inconsistencies.

State Form: Not a state form (LA County-specific form – ABPSSI-3 (06/2020))
Current Program: General Assistance/General Relief
Current Attached Forms: None
Current Forms Category: Forms
Current Template Repository Visibility: LA County
Existing Languages: English, Spanish
Current Print Options: All
Current Posted to SSP: Yes
Electronic Signatures:
    Electronic Signature (IVR/Text): No
    Check to Sign: No

2.1.2   Form Verbiage

Update ABPSSI-3 (06/2020) English Form XDP

The table below identifies the changes to be made to the ABPSSI-3 (06/2020) English form XDP. Please refer to Supporting Document #1, which is the mockup.

Location	Existing Language	Updated Language
Page 1	You have been scheduled a telephone interview with an SSI Advocate	You have been scheduled a **telephone interview** with an SSI Advocate
Page 1	Please have the following information ready for your telephone interview if you have them:	Please **have** the following information ready for your telephone interview if you have them:
Page 1	When on the call, be sure to mention you received this telephone interview notice. Be prepared to be	**When on the call, be sure to mention you received this telephone interview notice. Be prepared to be on the**

	on the phone for 15-30 minutes so that the SSI Advocate can determine your potential eligibility to SSI, CAPI or Veteran benefits.	**phone for 15-30 minutes so that the SSI Advocate can determine your potential eligibility to SSI, CAPI or Veteran benefits.**
Page 1 *Note: last word in "Existing Language" says "NUMER" instead of "NUMBER"	**IT IS IMPORTANT THAT YOU KEEP THIS APPOINTMENT. YOUR GENERAL RELIEF BENEFITS MAY STOP IF YOU DO NOT KEEP THIS APPOINTMENT. IF YOU ALREADY HAVE SOMEONE HELPING YOU, YOU MUST CALL THE SSI ADVOCATE BEFORE THE APPOINTMENT DATE AT THE TELEPHONE NUMBER ABOVE AND PROVIDE THE PERSON'S NAME AND TELEPHONE NUMER.**	**IT IS IMPORTANT THAT YOU KEEP THIS APPOINTMENT. YOUR GENERAL RELIEF BENEFITS MAY STOP IF YOU DO NOT KEEP THIS APPOINTMENT. IF YOU ALREADY HAVE SOMEONE HELPING YOU, YOU MUST CALL THE SSI ADVOCATE BEFORE THE APPOINTMENT DATE AT THE TELEPHONE NUMBER ABOVE AND PROVIDE THE PERSON'S NAME AND TELEPHONE NUMBER.**

Updated Languages: English

Include NA Back 9: No

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form Variable Population

There are no updates to the form variable population for the ABPSSI-3 (06/2020) English form.

2.1.4 Form Generation Conditions

There are no updates to the form generation conditions for the ABPSSI-3 (06/2020) English form.

2.2   Add the ABPSSI-3 (06/2020) to CalSAWS in provided threshold languages

2.2.1   Overview

The APBSSI-3 (06/2020) English form currently exists in CalSAWS in English and Spanish. The ABPSSI-3 (06/2020) has been provided by LA County in the following threshold languages and need to be added to CalSAWS: Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, and Vietnamese.

State Form: Not a state form (LA County-specific form – ABPSSI-3 (06/2020))

Current Program: General Assistance/General Relief

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: LA County

Existing Languages: English, Spanish

Current Print Options: All

Current Posted to SSP: Yes

Electronic Signatures:

    Electronic Signature (IVR/Text): No

    Check to Sign: No

2.2.2   Form Verbiage

Updated Languages: Armenian, Cambodian, Chinese, Korean, Russian, Tagalog, and Vietnamese.

2.3   Add the ABPSSI-4 (06/2020) to CalSAWS in provided threshold languages

2.3.1   Overview

The APBSSI-4 (06/2020) English form currently exists in CalSAWS in English and Spanish. The ABPSSI-4 (06/2020) has been provided by LA County in the following threshold languages and need to be added to CalSAWS: Vietnamese, Cambodian, Chinese, Korean, Russian, Tagalog, and Armenian.

State Form: Not a state form (LA County-specific form – ABPSSI-4 (06/2020))

Current Program: General Assistance/General Relief

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: LA County

Existing Languages: English, Spanish

Current Print Options: All

Current Posted to SSP: Yes

Electronic Signatures:

    Electronic Signature (IVR/Text): No

    Check to Sign: No

2.3.2   Form Verbiage

Updated Languages: Vietnamese, Cambodian, Chinese, Korean, Russian, Tagalog, and Armenian.

2.4   Add the ABPSSI-1 (07/17) to CalSAWS in provided threshold languages

2.4.1   Overview

The APBSSI-1 (07/17) English form currently exists in CalSAWS in English. The ABPSSI-1 (07/17) has been provided by LA County in the following threshold languages and need to be added to CalSAWS: Armenian, Cambodian, Chinese, Korean, Russian, Spanish, Tagalog, and Vietnamese.

State Form: Not a state form (LA County-specific form – ABPSSI-1 (07/17))

Current Program: General Assistance/General Relief

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: LA County

Existing Languages: English

Current Print Options: All

Current Posted to SSP: Yes

Electronic Signatures:

    Electronic Signature (IVR/Text): No

    Check to Sign: No

2.4.2   Form Verbiage

Updated Languages: Armenian, Cambodian, Chinese, Korean, Russian, Spanish, Tagalog, and Vietnamese.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Forms	ABPSSI-3 English Mockup	ABPSSI-3_EN_Mockup.pdf

Translations of the forms in applicable threshold languages are attached to Jira. Threshold language forms should follow same formatting as the corresponding English forms.

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California Statewide Automated Welfare System

Design Document

CA-223790

Update External Staging Export and QA & Indexing queue Retention Period

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Robyn Anderson
	Reviewed By	Christopher Vasquez

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/12/2024	1.0	Initial Version	Robyn Anderson

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1 OVERVIEW

1.1 Current Design

Documents Uploaded to the county QA & Indexing queues within Imaging remain in the queue until a worker routes the documents forward or deletes them. This can lead to large and unmanageable queues.

Printing and downloading is not possible from the External Staging Drawer. Users have no way to print/download documents from that drawer.

1.2 Requests

Create a 90-day retention period for QA & Indexing so that documents that exceed that retention time are auto deleted after the retention period has passed.

Allow users to print and download from the External Staging Drawer.

1.3 Overview of Recommendations

1. Documents in the QA & Indexing queues that exceed the set retention period will be automatically deleted from the system.
2. Modify drawer privileges so users with the xx_Export security right can print and download documents that are in the External Staging drawer.

1.4 Assumptions

1. Workers will still be able to route documents in QA & Indexing forward as they do today. That process will not change.
2. Due to product limitations in the Hyland Perceptive Content product, all counties will have the same retention period for QA & Indexing. This cannot be set by county.
3. Enabling printing and downloading from the External Staging drawer will not require any code changes or updates to the Hyland system.

2 RECOMMENDATIONS

2.1 QA & Indexing Retention period

2.1.1 Overview

Documents in the QA & Indexing queues will be deleted after the retention period has expired.

2.1.2 Description of Change

1. A script will put in place that looks through each of the QA & Indexing queues to check the creation dates for each scan and delete any that exceed the 90-day retention period. This script will run once per day as a scheduled task.
2. This will be a hard delete; once the document is deleted, it cannot be recovered.

2.2 Print from External Staging Drawer

2.2.1 Overview

Changes will be made to the Drawer Privileges for the existing xx_Export groups (where xx= two-digit county code). Any users in this group will be granted the privilege of printing documents and downloading in External Staging. Only users in this group will have the rights to print or download documents.

2.2.2 Description of Changes

For each county, the existing xx_Export group will be updated in the Explore/Folder View section so that the Print Document privilege is enabled for the External Staging drawer. This privilege will grant the user the ability to both print and download documents.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
CA-214058	Workflow	Original Environment Workflow Config	CA - 214058 - Environment Workflo
CA-214027	Security	CalSAWS-Hyland Security Mappings Content Revision2	CalSAWS-Hyland Security Mappings C

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-248711

Deny CAPI Person for Fail to Provide

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Business Analysts, Online Designer, Build Team, Test Team, CAPI Committee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/21/2024	1.0	Initial Draft	Yale Yee

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1 OVERVIEW

1.1 Current Design

A CAPI person is eligible for benefits when they fail to provide the Affidavit of Support or SOC 860.

1.2 Requests

A CAPI person is not eligible for benefits when they fail to provide the Affidavit of Support or SOC 860.

1.3 Overview of Recommendations

1. Add CAPI Failure to Provide (FTP) reasons on the Non-Compliance page for Affidavit of Support and SOC 860.
2. Update the CAPI EDBC to deny the CAPI person for the additional CAPI FTP reasons.
3. The FTP reasons are added to the CAPI EDBC override page and Manual CAPI EDBC.
4. Add a New NOA Reason to the NA-691 (9/23) for the additional FTP status reasons.

1.4 Assumptions

1. CA-202054 will address the suspension automation, discontinuance, reinstatement for a CAPI case and is scheduled for the release of 25.03. The FTP reasons mentioned in this SCR will be included in CA-202054.
2. A sponsored CAPI person is not eligible for benefits when the sponsor refuses to verify their income or property. A sponsored CAPI person is eligible for benefits when the sponsor income or property is Pending, Not Applicable or Verified.
3. The NA 691 is currently under revision. The new reason fragment will generate on the most recent version of the NA-691 NOA (9/22) until revisions are complete. SCR CA-282431 will update the Denial NOAs on the revised NA 691 NOA.
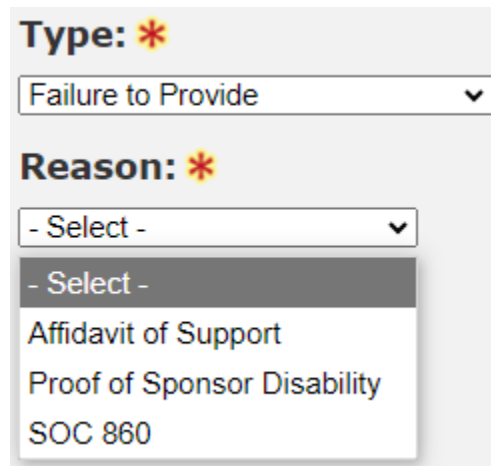
2   RECOMMENDATIONS

2.1   Eligibility Non-Compliance Detail page

2.1.1   Overview

Add the reasons of Affidavit of Support and SOC 860 for the Type of 'Failure to Provide' for a CAPI Non-Compliance option.

2.1.2   Eligibility Non-Compliance Detail Mockup

Figure 2.1.1 – Eligibility Non-Compliance Detail page

2.1.3   Description of Changes

1. Add the following reasons for the Type of 'Failure to Provide' for CAPI:
    a. Affidavit of Support
    b. SOC 860

    Note: The list of Reasons are in Alphabetical order.

    Technical note: The reasons are displayed on the Eligibility Non-Compliance List page and Transaction History Detail page.

2.1.4   Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Non-Compliance**

2.1.5   Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

Accessibility was not accessed with this SCR as new values are added to an existing dropdown.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Update CAPI EDBC to Apply FTP Reasons

2.2.1 Overview

CAPI EDBC is updated to apply the FTP Reasons and will deny the CAPI person.

2.2.2 Description of Changes

1. Update CAPI EDBC to apply the FTP Reasons and the CAPI person is denied.

   Technical Note:
   The FTP Reasons are person level status reasons:

Status Reason	CAPI	CAPI Priority
FTP - Affidavit of Support	Y	5730
FTP SOC 860	Y	5735

   Update the existing reason "Affidavit of Support" (CT73_8X) for reference columns related to CAPI.
   Add the reason FTP SOC 860 to CT73 with the information provided above.

2.2.3 Programs Impacted

CAPI

2.2.4 Performance Impacts

N/A

2.3 Add FTP Reasons to the Program Configuration Override Detail page

2.3.1 Overview

The FTP reasons are added to the Status Reason dropdown and will be selectable when a CAPI person is overridden.

2.3.2 Description of Changes

1. Add the following status reasons to the Program Configuration Override Detail page:
   a. Affidavit of Support
   b. FTP SOC 860

2.3.3 Programs Impacted

CAPI

2.3.4 Performance Impacts

N/A

2.4 Add FTP Reasons to the Program Configuration Detail page

2.4.1 Overview

The FTP reasons are added to the Status Reason dropdown and will be selectable on a manual EDBC for a CAPI person.

2.4.2 Description of Changes

1. Add the following status reasons to the Program Configuration Override Detail page:
   a. Affidavit of Support
   b. FTP SOC 860

2.4.3 Programs Impacted

CAPI

2.4.4 Performance Impacts

N/A

2.5 Add a new CAPI Failing to Comply with Application Process Denial NOA

2.5.1 Overview

Add a new CAPI denial reason for failing to comply with the application process. Specifically, if the person failed to provide their Affidavit of Support or their SOC 860 Form.

State Form/NOA: NA-691 (9/23)

NOA Template: CI_NOA_TEMPLATE

Program(s): CAPI

Action Type(s): Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y
  - **Includes standard NA Back 9 variable population:** Y

Forms/NOAs Generated with this NOA: None

Languages: English, Spanish

2.5.2 Form/NOA Verbiage

Create Fragment XDP

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting*
static	You have failed to cooperate with the county application process (see comments). (MPP Section 49-015.1) Comments: You have failed to provide: <STATUS_REASON_DESCRIPTION>	Arial, Size 10

*English only, Spanish and threshold will generate based on project standards for that language.

2.5.3 Form/NOA Variable Population

1. **Add Fragment Variable Population**

Variable Name	Population	Formatting*
STATUS_REASON _DESCRIPTION	Populates with a list of the specific FTP reasons the person failed to comply with the application process For Example: "Affidavit of Support" - For Status Reason of 'Failed to provide Affidavit of Support'(A4) (see Recommendation 3.2 for new Status reasons) "SOC 860 Form" – For Status Reason of 'Failed to provide SOC 860 Form' (FG)	Arial, Size 10

*English only, Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: STATUS_REASON_DESCRIPTION

2. **Add Fragment Regulations**
   MPP Section 49-015.1, §49-037.413

3. **Add NOA Title and Footer Reference for new Reason**
   This NOA will use the same header, title, and reference # as all CAPI denials which generate on state form NA 619 (9/23)

   NOA Reference on Document List Page: NOA – CAPI Denial

   NOA Title: Use existing CAPI Denial Title

   NOA Title Requires Translations: No, translated already

   NOA Footer: NA 691 (9/23)

   NOA Footer Requires Translations: No, translated already

2.5.4 Form/NOA Generation Conditions

1. **Add Fragment Generation**

   This reason will generate when all of the following are true:

   1) In the prior EDBC the Program Person was not active in the CAPI program

2) in the current EDBC the Program Person is denied from the CAPI program with an FTP status reason of not providing their Affidavit of Support or SOC 860 form (see Recommendation 2.2 for new Status reasons).

Action Fragment: CI_DN_ACTION1 (id=4084)

Message Fragment: N/A

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to verify the new FTP Reason values are available in the appropriate order on the Eligibility Non-Compliance Detail page, the Status Reason values are available on the Program Configuration Override Detail and Program Configuration Detail pages, and a Denial NOA is generated when CAPI EDBC denies an application for each of these reasons.

2.6.2 Description of Change

Create new regression scripts to verify each of the following:

1. The following Reason values are available on the Eligibility Non-Compliance Detail page, in the listed order, when Program is 'CAPI' and Type is 'Failure to Provide':
   a. Affidavit of Support
   b. Proof of Sponsor Disability
   c. SOC 860

   Technical Note: 'Proof of Sponsor Disability' is an existing value.
2. When EDBC is run for a Pending CAPI application, where the CAPI person
3. has one of the new non-compliance reasons, the application is Denied with the matching reason listed below and a denial NOA is generated:
   a. Affidavit of Support
   b. FTP SOC 860

   Technical Note: These scenarios are intended to cover the intake application only. Rescind and re-application scenarios are out of scope.
4. The following Status Reason values are available on the Program Configuration Override Detail page when overriding a regular EDBC for a Pending CAPI program:
   a. Affidavit of Support
   b. FTP SOC 860

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5. The following Status Reason values are available on the Program Configuration Detail page when creating a Manual EDBC for a Pending CAPI program:
   a. Affidavit of Support
   b. FTP SOC 860

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.1	The LRS shall process all individual and case eligibility factors prior to the calculation of a benefit amount.	The FTP Reasons are entered in the Non-Compliance page before the CAPI EDBC is run.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-252467

Modify the CalFresh, CalWORKs RE CalSAWS batch appointment logic

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Shining Liu
	Reviewed By	Edgars Reinholds, Himanshu Jain, Chitra Barsagade

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/26/2024	1.0	Initial draft	Shining Liu

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1 OVERVIEW

1.1 Current Design

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

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

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

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

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

1.2 Requests

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

1.3 Overview of Recommendations

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

appointment during this timeframe. (Note: CW only and CW/CF combo REs should continue to be scheduled during the RE Due Month only.)

    c. The batch jobs should schedule appointments up to and including the 10-day NOA cut-off every month.

    d. For counties that have opted to have customers initiate the call, bypass the valid phone number check.

    e. When a recipient has opted into IVR notifications, the batch jobs should check the 'Outbound IVR Call' checkbox when scheduling the appointment.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Migration Counties – CW/CF RE Appointment Scheduling

2.1.1 Overview

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

2.1.2 Description of Change

1. Modify the CW/CF RE Appointment Scheduling batch jobs by distributing appointments throughout the RE appointment period. Schedule appointments on the first available time slot(s) for each day from the beginning of the RE appointment period until the end of the appointment period.
   a. Example 1: There are six 15 minute-long appointments to schedule, and the worker has availability set up between 8am and 8:45am, October 1st to October 4th. Assume a Daily Threshold of 4 and no overlapping appointments. Appointments would be scheduled by the batch jobs in the following manner, with the earliest time slots in the RE appointment period per day filled first:

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

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

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

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

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

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

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

2.1.3 Execution Frequency

No change.

2.1.4 Key Scheduling Dependencies

No change.

2.1.5 Counties Impacted

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

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

2.1.6 Category

No change.

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.13.2.2	The LRS shall set appointments for cases requiring Redetermination and/or Recertification, based on program rules.	Modify batch RE appointment scheduling functionality.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-266766

EDBC Validation Message for eICT Cases ran after 10-day cutoff- Receiving Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/04/2024	1.0	Initial Draft	T. Lazio

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1 OVERVIEW

This SCR will add an EDBC hard validation to prevent the approval of a program in the 'Receiving' County after 10-day cutoff when there is an electronic Inter-County Transfer (eICT) and the program is 'Active' in the 'Sending' County.

1.1 Current Design

Current system functionality is allowing the 'Receiving' County to approve an ICT case effective as of the 1st of the next month at any time even when the same participant and program are still active in the 'Sending' County. This can cause complications such as duplication of benefits in both counties for the same month.

1.2 Requests

Add an EDBC hard validation to prevent the 'Receiving' County ICT case to be ran after 10-day cutoff for the future benefit month when there is an 'Active' program for the same primary applicant in the 'Sending' County. This action will force the 'Receiving' County to take the appropriate action including adjusting the BDA of the approved program or coordinating with 'Sending' County to make sure the program is properly discontinued in that County so there are no complications in issuing benefits.

1.3 Overview of Recommendations

1. Add EDBC hard validation for 'Receiving' County ICT case ran after 10-day cutoff with Active program in 'Sending' County.

1.4 Assumptions

1. SCR CA-272696 is updating the nightly batch job to terminate the program in the 'Sending' County on the same day as the program approval in the 'Receiving' County with the termination effective for the end of the month prior to the receiving county's approval date.

2 RECOMMENDATIONS

2.1 Eligibility - EDBC Validation Message for ICT Cases – Receiving County

2.1.1 Overview

This SCR will implement a hard validation to prevent the EDBC from being ran on an ICT case in the 'Receiving' County after Eligibility 10-day cutoff while the program and participant are still active in the 'Sending' County.

After the implementation of this SCR, if the 'Receiving' County tries to approve an ICT with an effective date of 03/01/2025, any time after 02/18/2025 (Eligibility 10-day), they will receive the hard validation. At which point the County would either need to change the BDA or contact the 'Sending' County to ask them to discontinue their case.

For Example: 'Receiving' County attempts to approve an ICT on 3/24/2025 (Eligibility 10-day is 3/21/2025) with effective date of 4/01/2025. They get the hard validation. They update the BDA to 5/01/2025 and approve effective 05/01/2025. The ICT sweep inserts the 'Sending' County program in sys_transact on 3/24/2025 and Batch runs EDBC for the 'Sending' County program/case on 3/25/2025 effective 05/01/2025. Since it's already past eligibility 10-day cut off for 04/2025, the come-up month is now 05/2025. The program in the 'Sending' County fails and is discontinued effective 5/01/2025.

NOTE: After SCR CA-272696 is implemented, the only difference would be that batch would run EDBC to discontinue the 'Sending' County program/case on 3/24/2025 (i.e. the same day the 'Receiving' County approved their case in the example above).

2.1.2 Description of Changes

Add a hard validation message of ***"Pending ICT - EDBC cannot be run for {benefit month} without adequate discontinuance time for the Sending County. Please review and adjust the BDA as appropriate, then run EDBC for the come-up month"*** when 'Receiving' County runs Online EDBC for the future benefit month on an ICT case and all the following conditions are met:
   a. Program Application has a source of 'ICT'.
   b. Program Application Inter County Transfer indicator is 'Yes'.
   c. Program is in a 'Pending' status.
   d. System date is after Eligibility 10-day cutoff date for the future benefit month.
   e. Program status is 'Active' for the same program type and primary applicant in the 'Sending' County.
   f. The most recent status for the eICT record is "In Process".

2.1.3 Programs Impacted

CalFresh

CalWORKs

RCA

Medi-Cal

2.1.4 Performance Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.2.12 (CAR-743)	The LRS shall process eligibility determination and benefit calculation for all assistances units that are affected by any change(s).	This SCR will prevent EDBC being ran on ICT cases in the 'Receiving' County after Eligibility 10-day cutoff so that the program can be properly discontinued in the 'Sending County to avoid complications/delays in calculating/issuing benefits.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-270888

MEDS: Introduce logic to support two Simultaneous MC programs and send EW40 when MC Aid Code Discontinues on One MEDS Segment and Begins on Another

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yuga Teja
	Reviewed By	Howard Suksanti

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/18/2024	1.0	Initial version	Yuga Teja

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1 OVERVIEW

1.1 Current Design

Currently, In CalSAWS MEDS EW40 does not support for the below scenarios mentioned.

Scenario 1: MEDS EW40 is triggered for the old MC program block when there is a new MC Program block is added.

Scenario 2: MEDS EW40 is not being triggered for the old aid code of a person when aid code is changed to another aid code from a different MEDS segment.

1.2 Requests

Scenario 1:

Update MEDS EW40 transaction logic to not trigger for a person when another MC program block B has been added for the same person when there exists active MC program block already.

Scenario 2:

Update MEDS transaction logic to trigger EW40 for the old aid code of a person when aid code is changed to another aid code from a different MEDS segment.

1.3 Overview of Recommendations

Update MEDS EW40 transaction job (PO00EM411, PO00EM448) logic to work as expected for a scenario when added a new MC block and for a scenario where aid code is changed to a different MEDS segment.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Update PO00EM411 EW40 MEDS transaction logic

2.1.1 Overview

Scenario 1: Currently, In CALSAWS when another medical program block B is made Active for a case for which there exist an active MC program block A already which is causing to trigger EW40 transaction for the previously active MC program block A which leads to discontinuance of MC program block A in MEDS and allowing only one active MC program block in MEDS at a time.

Scenario 2: In CALSAWS when Medi-Cal changes from an aid code from Segment A to another aid code from another segment B so the new aid code belongs to a different MEDS segment than the one that is terminating, CALSAWS isn't triggering EW40 as expected to MEDS for the terminating aid code.

2.1.2 Description of Change

Scenario 1:

- For a person in a case having an active MC program block A with aid code M1
- Add a new active MC program block B for the same person in case with aid code N7.

Expected Outcome: EW40 should not be triggered for the aid code M1 from old block A when new MC program block B is made Active so that both program blocks stay active in MEDS and CALSAWS.

Scenario 2:

- For a person in a case having a MC program with aid code T1
- After an EDBC run, aid code T1 changed to an aid code P5 which is from a different MEDS segment.

Expected Outcome: EW40 should be triggered for the aid code T1 from old MEDS segment.

Technical Note: MEDS aid code segment information can be retrieved from below query

select refer_table_14_descr, code_num_identif from code_detl where catgry_id =184;

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All County.

2.1.6 Category

Core- offPrime

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.3.7	The LRS shall provide a method for alerting COUNTY-specified Users when a discrepancy in LRS Data exists. When the LRS discovers a discrepancy, the LRS shall	This SCR will update MEDS EW40 transaction.

	display information to the User for follow-up action, as necessary.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-273791

LA County Courtesy Call Back

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Nicole Kenny

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/21/2024	1.0	Initial Draft	Jared Kuester
8/29/2024	1.1	Modified Estimated Wait Time Calculation	Jared Kuester

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1   OVERVIEW

Los Angeles County has requested a new Courtesy Call Back ("CCB") experience for customers and their workers. This change will replace the existing Amazon Connect CCB with a customized solution that calls customers back and places them into their original queue before connecting them with a worker. This change will optimize worker's productivity so they're not waiting for the system to call the customer back or needing to leave a voicemail for the customer.

1.1   Current Design

The current CCB is provided by Amazon Connect. This solution has the worker's Call Control Panel call the customer back when it's their turn to speak to a worker.

1.2   Requests

Replace the existing Amazon Connect CCB with a custom solution. The new CCB will call the customer back after calculating the Estimated Wait Time ("EWT") for the queue the customer is currently waiting in and place them back into the same queue they were originally in, or into an overflow queue if the original queue is at capacity. As part of the CCB solution, build a new Real-Time dashboard in the eCCP, and a new automated Historical Report that is sent every day, week, and month.

1.3   Overview of Recommendations

1. Update Los Angeles County's Call Flow.
    a. For details see the attached document (CA-273791 – LA CCB Callflow.pdf).
2. Build new IVR Lambdas.
    a. Build a new Estimated Wait Time Lambda.
    b. Build a new Amazon Connect Task API Lambda.
    c. Build a new Amazon Connect Start Outbound Voice Contact Lambda.
3. Build new reports.
    a. Build a new Real-Time Report Dashboard in the eCCP.
    b. Build a new automated Historical Report.
        i. For more information on the report see the attached document (CA-273791 – Historical Report.xlsx)

1.4   Assumptions

1. Real-Time CCB metrics will only be available in the eCCP.
    a. Real-Tim CCB metrics will not be available in the Amazon Connect Console, or within eGain.
2. Customers will get a call-back within nine minutes of the EWT.
3. This update will not change any other functionality in Los Angeles County's IVR.

2   RECOMMENDATIONS

2.1   Update Los Angeles County's Call Flow

2.1.1   Overview

Update the IVR Call Flow to offer customers the new Courtesy Call Back solution. This solution will give customers an EWT to expect a call back and schedule a call back for the time reported. Once it's time for the customer's call back request, the system will place an outbound call and request the customer to indicate if they are ready to speak to a worker. This will place the customer back into the queue they were originally in, with the same place in line.

2.1.2   Description of Changes

1. Update the IVR Call Flow
   a. Update Customer Queue Contact Flow.
      i. Remove the Amazon Connect provided CCB and send callers to the new flow "Offer CCB" if conditions to Offer CCB set in the Admin Page have been met.
      ii. Reset the CCB Offered flag to "No" after playing all queue messages.
   b. Update RE | Customer Queue Contact Flow.
      i. Remove the Amazon Connect provided CCB and send callers to the new flow "RE | Offer CCB" if conditions to Offer CCB set in the Admin Page have been met.
      ii. Reset the CCB Offered flag to "No" after playing all queue messages.
   c. Update RCC | Customer Queue Contact Flow.
      i. Remove the Amazon Connect provided CCB and send callers to the new flow "RCC | Offer CCB" if conditions to Offer CCB set in the Admin Page have been met.
      ii. Reset the CCB Offered flag to "No" after playing all queue messages.
   d. Create three (3) new Contact Flows (Offer CCB, RE | Offer CCB, and RCC | Offer CCB) that behave identically except they each send the caller back to the appropriate Customer Queue flow when opting out of CCB.
      i. At the start of the flow Invoke the EWT Lambda.
         1. If the Lambda returns a value for the EWT and Task start time, continue to offer CCB and set the reporting point CCB.Offer for each time CCB is offered to a customer.

2. If the Lambda fails to respond, or returns a result larger than 10,800 seconds, return the customer to the appropriate Customer Queue flow.

ii. Inform the customer of their estimated wait time, and request that the customer presses 1 if they would like to opt-in to CCB.

1. Play the dynamic EWT in ten (10) minute increments, starting with ten (10) minutes, through one hundred and twenty (120) minutes.
2. If the customer presses 1 to opt in for CCB, set the reporting point CCB.OptIn.
3. If the customer presses any key other than 1, play the message "*Sorry, that is not a valid response.*" and give them 1 additional attempt to make a valid selection. If no valid response is made, send the customer back into the queue and set the reporting point CCB.Decline.
4. If the customer does not make a selection within the 5 second delay, present the customer with 1 more attempt before sending them back to the queue and setting the reporting point CCB.Decline.

iii. If the customer opted-in for CCB, check if the customer's caller ID is available or not.

1. If the Caller ID is available, ask the customer to confirm if they would like to be called back at the same number as their caller ID, or if they would like to use a different phone number.
2. If the Caller ID is not available, prompt the customer to enter the phone number they wish to be called back at.

iv. If the customer's caller ID is not available, or if the customer indicated that they would like to be called back at a different phone number, prompt them to enter a ten (10) digit phone number, starting with the area code.

1. After the customer enters their ten (10) digit phone number, play the phone number back to them, and ask them to confirm that it's correct phone number by pressing 1, or to press 2 if it's incorrect.

   a. If the customer presses 2, send them back to the prompt that collects the customer's phone number.
   b. If the customer presses any button other than 1 or 2, play the message "*Sorry, that is not a valid response.*" and give them two more attempts to enter a valid phone

number. If all attempts have been exhausted, send them back to the queue.

  c. If the customer does not make a selection within the 5 second delay, give them two more attempts to enter a valid phone number. If all attempts have been exhausted, send them back to the queue.

 2. Confirm that the customer's phone number follows the North American Numbering Plan ("NANP") format, NYX NXX-XXXX, where N denotes any of the digits 2–9, Y denotes any of the digits 0-8, and X denotes any digit 0–9.

  a. If the phone number does not follow the NANP, give the customer two additional opportunities to enter a different phone number. If all attempts have been exhausted, send the caller back to the Customer Queue.

 v. If the customer's phone number that the system will be calling back follows the NANP, invoke the Task API Lambda to schedule the courtesy call back.

  1. If the Task is successfully created, play the message *"Your callback request has been successfully scheduled. Goodbye."* and release the call.

  2. If the API request is unsuccessful, play the message "There has been an error setting your callback. Returning you to your place in queue." and send the caller back to the customer queue.

e. Create a new Contact Flow "CCB Return" that places an outbound call to the customer.

 i. Set the CCB Retry flag to True and track the attempt number for the contact ID. The CCB Retry flag is used to track if the customer successfully answered the call and if they made a selection. If the Retry flag is true at the time the call is disconnected, the system will call the customer back in five (5) minutes, unless this was the third attempt to reach the customer.

 ii. Invoke the Start Outbound Voice Contact API Lambda.

  1. If the call was successfully answered, send the customer to the next prompt.

  2. If the call was unsuccessful, set a reporting point for the failure reason. If the customer's phone rang for twenty (20) seconds without being answered set the reporting point No Answer. If the phone number that was dialed is no longer in service or is busy at the time of calling, set the reporting point Bad Num.

iii. After calling the customer back, play the CCB Return announcement message based on the call back attempt number.

iv. Prompt the customer to make a selection to indicate if they are ready to speak to a worker, if they need additional time before speaking to a worker, or if they would like to cancel their callback request.

    1. If the customer selects option 1, set the reporting points CCB.Attempt.X and CCB.Success, set the CCB Retry flag to false, and Set the Working Queue to the queue the customer was originally in.

        a. CCB.Attempt.X is a dynamic reporting point. The X represents either 1, 2, or 3 depending on if this is the first, second, or third attempt to call the customer back.

        b. If the queue is currently at capacity, set the Working Queue to the Overflow queue. The overflow queue is based on the original queue they entered. For example, if the customer was originally in the C19_CalFresh_ENG queue, set the working queue to C19_Overflow_CSC_CalFresh).

            i. For more information see the overflow queue mapping document (CA-273791 – LA County Queue Settings.xlsx).

        c. After setting all reporting points and the working queue, invoke the EWT Lambda.

        d. If the Lambda returns an EWT, subtract the value returned from the time that the customer has already waited to speak to a worker. If the result is a positive integer, play the estimated wait time.

        e. If the result of the above calculation is less than 1 minute, play the default message "Thank you for your selection. You will be assisted soon."

    2. If the customer selects option 2, set the retry flag to false, and play a loop of a message and music 5 times. If at any time the customer presses a button on their phone, send them down the same path as option 1.

        a. If the customer never makes a selection, give them one final opportunity to press 1. If the customer does not press 1 after a 10 second delay, set the DelayTimeout reporting point and release the call.

3. If the customer selects option 3, set the retry flag to false, set the Cancelled reporting point, and release the call.
4. If the customer makes an invalid selection or fails to make a selection after the five (5) second delay, provide the customer two (2) more attempts.
   a. If no valid selection has been made after three (3) attempts, set the reporting point of either Attempt2, or Attempt 3, and release the call. The Attempt reporting points are used to track what the next attempt number will be.
v. Increase the routing age of the call by subtracting the queued time of the Original Contact ID from the current system timestamp. For example, if the Original Contact ID had a queued time of 10:00:35 AM, and the caller was placed back into queue at 10:53:41 AM, increase the routing age of the call by 3186 seconds.
   1. This ensures the customer's place in line is retained.
f. Create a new Contact Flow "CCB Retry".
   i. If it is less than 3, set the next attempt number reporting point, and schedule a new courtesy call back for five (5) minutes from the current system timestamp.
   ii. If the attempt count is 3 set the Unresponsive reporting point, release the call, and do not attempt to call the customer back.
g. For additional details, please see the attached call flow document (CA-273791 – LA CCB Call Flow.vsdx).

2.2 Build New IVR Lambdas

2.2.1 Overview

The new LA County CCB solution relies on new lambdas to process the callback requests. The lambdas will estimate the customer's wait time, create new Amazon Connect Tasks via API, Place Outbound Calls to the customer, and store reporting information.

2.2.2 Description of Changes

1. Build a new EWT Lambda
   a. When offering CCB to the customer take the following actions.
      i. Query a new DynamoDB for the current queue's average wait time.

1. If the data in the DynamoDB is older than 1 min, submit the following queries.
   a. Make a GetCurrentMetricData API request using the OLDEST_CONTACT_AGE filter. This API request returns the Longest Call in the Queue.
   b. Query the Estimated Wait Time DynamoTable for the oldest pending CCB calls in the current queue. This query will return the longest EWT previously reported for calls still waiting for a call back.
2. Identify the larger of the two numbers collected and update the DynamoDB table , and the EWT variable with the updated information.

ii. Calculate the EWT to announce to the customer.
   1. Subtract the time the caller has waited in queue from the calculated EWT. This ensures an accurate wait time remaining is played each time it's announced to the customer.
   2. Estimated wait times are announced in ten-minute increments, starting at ten minutes through 120 minutes.
   3. Use the EWT response to set the prompt. As an example, if the API returned a response of 2732 seconds, set the Estimated Wait time prompt to 50 minutes.

iii. Calculate the Timestamp for creating the Task.
   1. If the call entered the queue at 10:00:00 AM, and the GetCurrentMetricData API request returned a response of 2732 seconds, set a callback timestamp of 10:45:32 AM.

b. When calculating the EWT after calling the customer back, take above actions as well as the following.
   i. Subtract the Previous Contact ID's queued time from the current system timestamp. This is used to adjust the routing age of the call.
   ii. Subtract the time the customer has already waited from the calculated EWT. This is used to play the EWT back to the customer.

2. Build a new Amazon Connect Task API Lambda with the following configuration.
   a. Set the ContactFlowID to the new "C19_CCB_Return" contact flow. See the page CCB Return in the attached Call Flow document for more information.
   b. Set the PreviousContactId to the ContactID of the current call the customer is connected to the IVR.
   c. Set ScheduledTime to the value returned from the Estimated Wait Time Lambda for the Task Timestamp.

i. This ensures that the customer is called back near the time that their call would have been answered if the customer had remained on the line.

d. Set the following custom attribute:
    i. CCB Attempt number.

3. Build a new StartOutboundVoiceContact API Lambda to place outbound calls to the customer with the following configuration.

a. Set the destination phone number to the customer's provided phone number.

b. Set the Source phone number to the following:
    i. Set the caller ID for all CSC Queues to 1-866-613-3777,
    ii. Set the caller ID for all RE Line Queues to 1-888-999-7671

2.3   Build New CCB Reports

2.3.1   Overview

Build a new Real-Time CCB report in the eCCP, and a new automated Historical CCB Report. The Historical CCB report will be scheduled to run at the end of the day each business day, the end of each week, and the first of each month.

2.3.2   Report Mockups

Figure 2.3.2.1 – Queue Metrics Update

Figure 2.3.2.2 – Real-Time CCB Report

Queue Name	Pending Call Back Calls	Max Wait Time	Successful Callbacks	Cancelled Callbacks	Retry Callbacks
Summary	1020	1:20:34	3524	121	1871
General Inquiry	504	1:20:34	1921	54	665
CSC Intake	216	0:56:37	824	17	277
RE Line Summary	300	1:15:31	779	50	929
C19_CalFresh_ENG	124	1:20:34	521	24	417
C19_CalWORKs_ENG	103	1:11:52	98	7	145
C19_CalWORKs_SPA	41	1:01:11	241	9	149
C19_CalFresh_SPA	24	0:54:11	122	14	54
C19_CalFresh_CAM	11	0:12:11	2	8	2
C19_CalFresh_CTN	9	0:04:15	9	1	0
C19_CalFresh_FAR	4	0:13:22	11	3	8
C19_CalWORKs_ARM	4	0:18:09	8	2	1
C19_CalWORKs_FAR	3	1:13:01	7	0	0
C19_MediCal_ENG	2	0:18:38	12	2	4

Figure 2.3.2.3 – Real-Time CCB Report with Search open

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Date Range	5/20/2024 08:00 - 5/21/2024 08:00	
Report Generated On	5/21/2024	
Summary Report		

Summary	Offered	Successful	Offered to Queue Correction	Opt In	Declined	Unsuccessful	Unresponsive	No Answer	Bad Number	Cancelled	Delay Timeout	Total Attempts	Total 1st Attempts	Total 2nd Attempts	Total 3rd Attempts	Answered On 1st Attempt	Answered On 2nd Attempt	Answered On 3rd Attempt	API Failure
Total	6620	6196	8029	6531	89	284	0	219	65	49	0	8881	6531	1621	729	4910	841	445	0
ENG	4314	4062	5184	4264	50	185	0	125	60	17	0	5840	4264	1079	497	3185	565	312	0
SPA	1801	1744	2170	1784	17	31	0	26	5	9	0	2357	1784	413	160	1371	244	129	0
ARM	43	29	61	38	5	6	0	6	0	3	0	55	38	10	7	28	0	1	0
CAM	83	68	108	81	5	6	0	6	0	5	0	111	81	22	8	59	7	2	0
CTN	48	36	63	46	2	6	0	6	0	4	0	64	46	12	6	34	2	0	0
FAR	47	35	66	45	2	8	0	8	0	2	0	67	45	14	8	31	4	0	0
KOR	49	38	66	47	2	6	0	6	0	3	0	64	47	11	6	36	2	0	0
MAN	65	52	85	62	3	9	0	9	0	1	0	87	62	15	10	47	4	1	0
RUS	76	63	97	74	2	10	0	10	0	1	0	102	74	18	10	56	7	0	0
TAG	46	35	64	44	2	8	0	8	0	1	0	64	44	12	8	32	3	0	0
VIE	48	34	65	46	2	9	0	9	0	3	0	70	46	15	9	31	3	0	0

Queue	Offered	Successful	Offered to Queue Correction	Opt In	Declined	Unsuccessful	Unresponsive	No Answer	Bad Number	Cancelled	Delay Timeout	Total Attempts	Total 1st Attempts	Total 2nd Attempts	Total 3rd Attempts	Answered On 1st Attempt	Answered On 2nd Attempt	Answered On 3rd Attempt	API Failure
C19_CalFresh_ARM	11	9	14	10	1	1	0	1	0	0	0	14	10	2	2	8	0	1	0
C19_CalFresh_CAM	42	38	51	41	1	0	0	0	0	1	0	54	41	11	2	30	6	2	0
C19_CalFresh_CTN	7	5	9	7	0	1	0	1	0	1	0	11	7	3	1	4	1	0	0
C19_CalFresh_ENG	2102	2082	2523	2097	5	12	0	8	4	3	0	2742	2097	468	177	1629	288	165	0
C19_CalFresh_FAR	9	7	11	8	1	1	0	1	0	0	0	11	8	2	1	6	1	0	0
C19_CalFresh_Intake_ARM	4	2	5	4	0	1	0	1	0	1	0	7	4	2	1	2	0	0	0
C19_CalFresh_Intake_CAM	12	9	15	11	1	0	0	0	0	2	0	14	11	3	0	8	1	0	0
C19_CalFresh_Intake_CTN	4	1	5	4	0	2	0	2	0	1	0	9	4	3	2	2	1	0	0
C19_CalFresh_Intake_ENG	1147	1004	1377	1128	19	118	0	77	41	6	0	1667	1128	342	197	786	139	79	0
C19_CalFresh_Intake_FAR	2	1	3	2	0	1	0	1	0	0	0	4	2	1	1	1	1	0	0
C19_CalFresh_Intake_KOR	3	3	4	3	0	0	0	0	0	0	0	3	3	0	0	3	0	0	0
C19_CalFresh_Intake_MAN	1	1	2	1	0	0	0	0	0	0	0	1	1	0	0	1	0	0	0
C19_CalFresh_Intake_RUS	6	5	8	5	1	0	0	0	0	0	0	6	5	1	0	4	1	0	0
C19_CalFresh_Intake_SPA	392	388	471	390	2	1	0	1	0	1	0	507	390	86	31	304	54	30	0
C19_CalFresh_Intake_TAG	1	0	2	1	0	1	0	1	0	0	0	3	1	1	1	0	0	0	0
C19_CalFresh_Intake_VIE	3	2	4	3	0	1	0	1	0	0	0	5	3	1	1	2	0	0	0
C19_CalFresh_KOR	2	1	3	1	1	0	0	0	0	0	0	1	1	0	0	1	0	0	0
C19_CalFresh_MAN	7	7	9	7	0	0	0	0	0	0	0	8	7	1	0	6	1	0	0
C19_CalFresh_RUS	2	2	3	2	0	0	0	0	0	0	0	2	2	0	0	2	0	0	0
C19_CalFresh_SPA	814	804	977	812	2	7	0	5	2	1	0	1068	812	183	71	629	111	64	0
C19_CalFresh_TAG	2	1	3	2	0	1	0	1	0	0	0	4	2	1	1	1	0	0	0
C19_CalFresh_VIE	1	1	2	1	0	0	0	0	0	0	0	1	1	0	0	1	0	0	0
C19_CalWORKs_CAM	1	0	2	1	0	1	0	1	0	1	0	2	1	1	0	0	0	0	0
C19_CalWORKs_CTN	4	3	5	4	0	1	0	1	0	0	0	6	4	1	1	3	0	0	0
C19_CalWORKs_ENG	124	112	149	121	3	7	0	5	2	2	0	169	121	33	15	88	16	8	0
C19_CalWORKs_FAR	7	6	9	7	0	1	0	1	0	0	0	10	7	2	1	5	1	0	0
C19_CalWORKs_Intake_ARM	2	2	3	2	0	0	0	0	0	0	0	2	2	0	0	2	0	0	0
C19_CalWORKs_Intake_CAM	1	1	2	1	0	0	0	0	0	0	0	1	1	0	0	1	0	0	0
C19_CalWORKs_Intake_ENG	130	117	156	122	8	4	0	3	1	1	0	165	122	30	13	92	16	9	0
C19_CalWORKs_Intake_FAR	1	1	2	1	0	0	0	0	0	0	0	1	1	0	0	1	0	0	0
C19_CalWORKs_Intake_KOR	2	1	3	2	0	0	0	0	0	1	0	3	2	1	0	1	0	0	0
C19_CalWORKs_Intake_MAN	2	2	3	2	0	0	0	0	0	0	0	2	2	0	0	2	0	0	0
C19_CalWORKs_Intake_RUS	9	8	11	9	0	1	0	1	0	0	0	12	9	2	1	7	1	0	0
C19_CalWORKs_Intake_SPA	102	98	123	101	1	3	0	2	1	0	0	135	101	24	10	77	14	7	0

Figure 2.3.2.4 – Historical CCB Report

2.3.3 Description of Change

1. Create a new Real-Time Report in eCCP.
   a. Create new tabs "Queue Statistics" and "Courtesy Call Back" in the Queue Statistics section of the eCCP that only displays for C19.
      i. Refresh the Real-Time CCP report every 30 seconds.
   b. The first four rows of the real-time report are summary rows that always display when navigating through queues.
      i. The Summary row is a sum of all queues.
      ii. The General Inquiry ("GI") row is a sum of all the GI CSC queues.
      iii. The CSC Intake is a sum of all the Intake queues.
      iv. The RE Line Summary is a sum of all RE Line Queues.
      v. For a list of queues and what summary row they belong in, please see the attached document (CA-273791 – LA County Queue Settings.xlsx).
   c. The first column of the Real-Time Report is Queue name.
      i. This column is searchable and should return results for any Queue that contain the search criteria (e.g., Searching for "RELine" will return all RE Line queues).
   d. Pending Call Back Calls is the total number of calls associated with the queue still awaiting a call back.
      i. By default, display the report in descending order of Pending Call Backs.

e. Max Wait Time is the amount of time the oldest call currently waiting for a callback has been waiting for a callback.
  i. Times will be listed in h:mm:ss format.
f. Successful Callbacks is the total number of CCB calls that were successfully placed back into queue during the current business day.
g. Cancelled Callbacks is the total number of CCB calls that were cancelled by the customer during the currently business day.
h. Retry Callbacks is the total number of second or third call backs that were made during the current business day.
  i. The column will not display initial callback attempts, only second or third attempts.
i. Set the default queue numbers per page to 10.
  i. Allow the customer to select 10, 25, 50, and 100 from the # / Page dropdown menu.
j. Add an Export button that downloads the contents of the DynamoDB table used to populate the CCB Real-Time report as a CSV file.
  i. Save the CSV file with the following name "CCB Real-Time - <timestamp>"

2. Create a new automated Historical CCB report.
  a. Create an automated Excel report that's e-mailed to The County each day, each week, and each month.
    i. Run the daily report at 00:00:00 each day following a business day.
      1. If the Contact Center was closed the day prior, do not run the report.
      2. Include all CCB calls between 00:00:00 through 23:59:59 the previous business day.
    ii. Run the weekly report every Sunday at 00:00:00.
      1. Include all CCB calls between 00:00:00 the previous Sunday, and 23:59:59 Saturday.
    iii. Run the monthly report the 1st of every month at 00:00:00.
      1. Include all CCB calls between 00:00:00 the 1st of the previous month, and 23:59:59 the last day of the month.
  b. Name the report based on the timeframe that was ran.
    i. Name daily reports "Daily CCB Report - <date>.
    ii. Name weekly reports "Weekly CCB Report - <date range>.
    iii. Name Monthly reports "Monthly CCB Report" - <Month, Year>
  c. Summarize all CCB calls based on Language selection, and by queue.
  d. Include the following columns:
    i. Offered – This is the total number of times CCB was offered to a customer.

ii. Successful – This is the total number of CCB calls that were successfully placed back into queue.

iii. Offered to Queue Correction – This is the total number of calls offered to the queue and subtracting the total number of Successful CCB calls.

iv. Opt-In – This is the total number of times a customer opted in for CCB.

v. Declined – This is the total number of times a customer opted out of CCB.

vi. Unsuccessful – A summary of the columns "Unresponsive", "No Answer", and "Bad Number".

vii. Unresponsive – This is the total number of CCB calls that were answered but no selection was made after three callback attempts.

viii. No Answer – This is the total number of CCB call attempts that were not answered by the customer.

ix. Bad Number – This is the total number of CCB call attempts that were unable to process due to an issue with the customer's phone number.

x. Cancelled – This is the total number of CCB calls that were cancelled by the customer.

xi. Delay Timeout – This is the total number of CCB calls that were ended due to not making a selection after indicating that they needed additional time before speaking with a worker.

xii. Total Attempts – This is the total number of CCB attempts that have been made.

xiii. Total 1st Attempt – This is the total number of first attempts to contact the customer.

xiv. Total 2nd Attempt - This is the total number of second attempts to contact the customer.

xv. fattempts to contact the customer.

xvi. Answered On 1st Attempt – This is the total number of CCB Calls that were answered on the 1st attempt to call the customer back.

xvii. Answered On 2nd Attempt – This is the total number of CCB Calls that were answered on the 2nd attempt to call the customer back.

xviii. Answered On 3rd Attempt – This is the total number of CCB Calls that were answered on the 3rd attempt to call the customer back.

xix. API Failure – This is the total number of times the solution was unable to schedule a new CCB for a customer.

e. Create four copies of the report in separate tabs.

i. The first tab is a summary of all CCB calls.

ii. The second tab is a summary of all CCB calls for the CSC GI Queues.

iii. The third tab is a summary of all CCB calls for the Intake queues.

iv. The fourth tab is a summary of all CCB calls for the RE Line queues.

v. For a list of queues and what summary row they belong in, please see the attached document (CA-273791 – LA County Queue Settings.xlsx).

f. For additional information, see the attached report mock-up (CA-273791 - CCB Historical Report).

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Contact Center	Amazon Connect API GET_METRIC_DATA	GetMetricData API
2	Contact Center	Amazon Connect API StartTaskContact	StartTaskContact API
3	Contact Center	Amazon Connect API StartOutboundVoiceContact	StartOutboundVoiceContact API
4	Contact Center	LA County Call Flow	CA-273791 - LA CCB Call Flow.vsdx
5	Contact Center	LA County updated verbiage sheet	CA-273791 - LA CCB Verbiage Sheet.xlsx
6	Contact Center	Historical CCB Report Mockup	CA-273791 - CCB Historical Report.xls
7	Contact Center	Queue Settings List	CA-273791 – LA County Queue Settin

4 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-274050

Add Mailed Date to Document Detail Page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Phong Xiong, Howard Suksanti
	Reviewed By	Edgars Reinholds, P Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/20/2024	1.0	Initial Draft	Phong Xiong, Howard Suksanti
09/23/2024	2.0	Updates as per committee feedback	Phong Xiong, Howard Suksanti
09/26/2024	2.1	Updates as per additional committee feedback	Phong Xiong, Howard Suksanti

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1 OVERVIEW

1.1 Current Design

For fair hearing purposes, pre-CalSAWS, there were some forms (such as the SAR 7 & IRT notices) that didn't have the Mailed Date listed on the actual form. In these instances, fair hearings usually has to print the CalWIN client correspondence screen that shows the Mailed Date, so that the fair hearings judge can see when the County actually mailed it to the client because the Mailed Date shown in CalWIN isn't showing in CalSAWS. CalSAWS appears to only show the print date.

Currently, only the Print Date is displayed on the Document Detail page under the Distributed Documents Search page and the Mailed Date is not captured by CalSAWS.

1.2 Requests

Solano county wants to add the Mailed Date to the Document Detail page to reflect when the client was actually mailed the correspondence; only the Print Date is currently reflected.

The Mailed Date is also a precursor to the Alternate Formats effort for forms/NOAs for CDSS. Alternate Formats can take up to 20 days to be created so workers will need to know when a form/NOA has been mailed.

1.3 Overview of Recommendations

1. Add the Mailed Date to the Document Detail page to reflect when the client was mailed the correspondence.
2. Create an interface with Gainwell to accept a Mailed Date to be stored in CalSAWS.

1.4 Assumptions

1. Every form/NOA mailed via Central Print to the customer will have an associated Mailed Date stored in CalSAWS.
2. SCR CA-282379 will establish the connectivity with Gainwell and must be implemented prior to this SCR.
3. This effort is for forms/NOAs printed centrally only. Forms/NOAs that are placed on-hold and not yet mailed out will not have a Mailed Date associated to them in the GENERATE_DOC table; therefore, will not be displayed on the Document Detail page. Print Local forms are controlled by the counties, not Gainwell; so, there will be no associated Mailed Date to these records and will have a blank Mailed Date.
4. The Print Exception Report that lists all forms/NOAs that have not been printed is not affected by the changes of this SCR. Forms/NOAs in this report will not have an "Initial Print Date," "Last Central Print Date," and "Mailed Date."

5. The Print Date and Last Central Print Date that is displayed on the Document Detail page is not the same as the new Mailed Date that will be displayed. Forms/NOAs that are printed are not always mailed out in the same day depending on the time of day in which those forms/NOAs are printed.
6. This effort is for ongoing forms/NOAs mailed out after implementation. Forms/NOAs mailed prior to this effort will not have a mailed date associated to them. Records from CalWIN that included the mailed date for forms/NOAs were not migrated over to CalSAWS and those converted records for forms/NOAs are not included in this effort.
7. The new Mail Date file will be transferred to CalSAWS before batch starts. For example, bundles from yesterday would be processed today. The Mail Date csv file will be sent to CalSAWS before CalSAWS batch starts.
8. The new Mail Date file will be encrypted.

2   RECOMMENDATIONS

2.1   Create a Secure File Transfer Protocol (SFTP) batch job to receive the new Mailed Date file

2.1.1   Overview

There is no SFTP batch to process the new Mailed Date file.

2.1.2   Description of Change

1. Create a Batch Schedule Change Request (BSCR) for the new SFTP batch job.
2. The batch will transfer the inbound file to the Process folder.
3. The file will be in CSV format.
4. The file name will be MailDate_YYYYMMDD.CSV

2.1.3   Execution Frequency

Daily Mon-Sat exclude Sunday and Holiday.

2.1.4   Key Scheduling Dependencies

Before the inbound Reader job.

2.1.5   Counties Impacted

All Counties.

2.1.6   Category

Core.

2.1.7   Data Volume/Performance

N/A.

2.1.8   Interface Partner

Gainwell.

2.1.9   Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file

from the directory and contacting the external partner if there is an account or password issue, etc...)

2.2 Create a new Inbound Reader job to process the Mailed Date file

2.2.1 Overview
Create a new batch job to process the new Mailed Date inbound file.

2.2.2 Description of Change
1. Create a Batch Property Change Request (BPCR) and BSCR for the new job.
2. The batch will process the inbound record and save the Mailed Date in GENERATE_DOC table on all documents that are associated to the bundle file. The Mail Date will be displayed on the Document Detail page.
3. There is no Trailer line.
4. The file will be in CSV format.
5. The File layout will be as following.

Table 1– Mailed Date File Layout

Name	Type	Required (Y/N)	Description
Bundle Name	String	Y	Bundle File name.
Mailed Date	Date	Y	Mailed Date in this Format: MM/DD/YYYY

2.2.3 Partner Integration Testing
Y

2.2.4 Execution Frequency
Daily Mon-Sat exclude Sunday and Holiday.

2.2.5 Key Scheduling Dependencies
After the new SFTP job.

2.2.6 Counties Impacted
All Counties.

2.2.7 Category
Core.

2.2.8 Data Volume/Performance
N/A.

2.2.9 Interface Partner
Gainwell.

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

2.3 Add Mailed Date to Documents Detail Page

2.3.1 Overview

The Document Detail page displays some relevant information about a form or NOA that has been generated for a case. This recommendation will add a new field called "Mailed Date" that will display the date the form or NOA was mailed out to the customer.

2.3.2 Description of Change

1. Add a new field in the Document Detail page called "Mailed Date" with the new MAILED_DATE captured in section 2.2.

Each MAILED_DATE is specific to a form or NOA and lives in the GENERATE_DOC table. The MAILED_DATE represents the date the correspondence was mailed out to the customer and used for Fair Hearings purposes. CalSAWS will not use this date for anything other than displaying the information. Please see below screenshot.

Document Detail

| | | | | Reprint Locally | eSign | Edit | Close |

Document Information

Name:	Number:	Category:
Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	Application
Program:	**Benefit Month:**	**Self-Service Portal:**
CalFresh		

Date Signed: **Comments:**

Variation	Language	Initial Print Date	Last Central Print Date	Print Status	Mailed Date
Final	English			Printed Centrally	

| | | | | Reprint Locally | eSign | Edit | Close |

Forms/NOAs that are reprinted centrally have different GENERATE_DOC records associated to them. The initial Print Central record for a form will display the Mailed Date associated to that initial record. If that form/NOA is reprinted, CalSAWS creates a new GENERATE_DOC record and Document Detail page for the reprinted record. This reprinted record will have the new Mailed Date for that form when it is mailed out. Please see below screenshot for Reprint Central.

Document Detail

Document Information

Name:	Number:	Category:
Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	Application

Program:
CalFresh

Benefit Month: **Self-Service Portal:**

Date Signed: **Comments:**

Variation	Language	Initial Print Date	Last Central Print Date	Print Status	Mailed Date
Final	English			Reprinted Centrally	

2. Database Change Request (DBCR) to GENERATE_DOC to add the new MAIL_DATE column.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.2.6 CAR-1228	The LRS shall include the ability to reprint a notice, NOA, form, letter, stuffer, and flyer in the format and language in which it was originally generated and mailed to the applicant, participant, caregiver, sponsor, authorized representative, or any other entity, and shall include the date and time of the originally generated notice, NOA, form, letter, stuffer, or flyer, as well as that of the reprint.	Updating Document Detail page where workers can reprint forms/NOAs to include a Mailed Date.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-274768

Update EDBC Determination of Zero Basic Grant for CW

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Satish Kumar
	Reviewed By	Business Analyst

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/27/2024	1.0	Initial Draft	Satish Kumar
10/07/2024	1.1	Updated the comments from county	Satish Kumar

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1   OVERVIEW

This document identifies required changes to CalSAWS system, when an Assistance Units (AU) Net Nonexempt Income (NNI) exceeds the Maximum Aid Payment (MAP), but their income remains below the Tier 2 IRT, the AU may be eligible for a Zero Basic Grant (ZBG), their CalWORKs case may remain open, and they may remain eligible for CalWORKs supportive services even though they are not eligible for a cash grant.

ACL 23-96, states that in the above case, the Net Nonexempt Income (NNI) should be used to determine whether the AU remains financially eligible for CalWORKs.

1.1   Current Design

When CW / RCA financial eligibility is being evaluated, IRT evaluation is done based on Family MAP Test.

CalWORKs eligibility fails for over income when an Assistance Units NNI income exceeds the Maximum Aid Payment, and their gross exceeds the Tier 2 IRT.

1.2   Requests

As per ACL 23-96 request, CalSAWS system must apply applicable income exemptions and disregards to the total reported income to determine Net Nonexempt Income (NNI), and the NNI should be used to determine whether the AU remains financially eligible for CalWORKs.

When an AU's income exceeds the Maximum Aid Payment (MAP), but their NNI income remains below the Tier 2 IRT, the AU may be eligible for a Zero Basic Grant (ZBG), their CalWORKs case may remain open, and they may remain eligible for CalWORKs supportive services with a benefit amount from $0 to less than $10.

1.3   Overview of Recommendations

1. When an AU's NNI income exceeds the Maximum Aid Payment (MAP), but their NNI income remains below the Tier 2 IRT, the CW / RCA EDBC rules will be modified to use Net Nonexempt Income (NNI) to determine whether the AU remains financially eligible for CalWORKs. NNI income will be used to determine whether CalWORKs program is eligible for a Zero Basic Grant (ZBG), Check if case can remain eligible for CalWORKs supportive services even though they are not eligible for a cash grant.
2. Regression test impacted NOAs and Forms that populate the CalWORKs eligibility limits.

1.4 Assumptions

1. This change is only related to CalWORKs Eligibility budget calculations.
2. For CalWORKs cases with income less than the Tier 1, the system will continue to determine eligibility after applying the income exemptions and disregards to the total reported income.
3. AUs eligible to a grant under $10 do not receive an issuance and are known as Zero Basic Grant (ZBG) cases.
4. New EDBC's that are triggered after the implementation of this SCR will reflect the new IRT Calculation.

2 RECOMMENDATIONS

2.1 CalWORKs EDBC Updates

2.1.1 Overview

Update CalWORKs EDBC rules to use Net Nonexempt Income to determine whether the AU remains financially eligible for CalWORKs.

2.1.2 Description of Changes

1. When an AU's NNI income exceeds the Maximum Aid Payment (MAP)and when NNI income remains below the Tier 2 IRT calculations Modify the CalWORKs EDBC rule to make used of the total NNI and use the NNI amount to calculate CalWORKs eligibility. Cases with NNI income under Tier 2 with benefit amount less than $10 will be eligible to ZBG.
2. Update CalWORKs EDBC rules not to fail the eligibility for over income when the AU's NNI income exceeds the Maximum Aid Payment (MAP)and when NNI income remains below the Tier 2 IRT calculations. Update the CalWORKs EDBC Rules to provide the ZBG for the case based on the NNI check with the Tier 2 calculated amount.

2.1.3 Programs Impacted

CalWORKs

Refugee Cash Assistance

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC / EDBC Results

2.2 Regression Test Impacted CalWORKs NOA Variable Population

2.2.1 Overview

CW NOAs populate with the eligibility amount for the program in CalSAWS.

2.2.2 Description of Changes

All NOA Fragments populate the eligibility benefit amount for CalWORKs. These Fragments need to be regression tested to confirm that they populate with the correct values as detailed in ACL 23-96.

3 OUTREACH

3.1 Lists

This list is for county information. This list contains the details of CalWORKs cases that are discontinued for over income after 07/2022.

A list of CW / RCA cases will be provided where CW eligibility has failed for over income where the total gross nonexempt income exceeds the Maximum Aid Payment (MAP), but their net nonexempt income remains below the Tier 2 IRT.

List Name: List_of_CW_Cases_Where_Eligiblity_failed_for_over_income.
List Criteria: Provide a list of CW/RCA cases after 07/2022 where

- the CW eligibility has failed for over income and
- their net nonexempt income remains below the Tier 2 IRT.

Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- **Additional Column(s):** Discontinue Date, AU size, AU Tier 2 IRT at discontinuance, NNI at the time of the discontinuance, Mandatory reporting cycle (AR/CO or DAR), Next mandatory reporting (SAR or RE), Was CF attached to the case, Was TCF issued, Was the TCF RE completed.

Frequency: One-time

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-274768

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-276880

Add Additional Application Source Codes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Andrea Rodriguez
	Reviewed By	Michael Wu, Matthew Lower, Chitra Barsagade, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/12/2024	1.0	Initial	Andrea Rodriguez, William Baretsky

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1 OVERVIEW

This SCR adds additional Application Source Codes options counties need. Since there is no ability to enter a code in plaintext, this SCR will add three new Application Source Code options to the dropdown used for the selection.

1.1 Current Design

The Application Source Code choices in CalSAWS are limited to certain selections without the ability to enter plain text. Due to this limitation the choices do not cover all of the sources that applications are received and therefore reports are not as useful as needed for managing workload.

1.2 Requests

Add additional application source codes for counties to utilize. The additional source codes to be added should include:

- BCCTP
- LIS
- SSI/SSP Denial

1.3 Overview of Recommendations

1. Update the 'Source' field on the Application Registration Summary with additional values.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically stated by this document.

2   RECOMMENDATIONS

2.1   Application Registration Summary

2.1.1   Overview

Update the 'Source' field on the Application Registration Summary page with additional Source code values.

2.1.2   Application Registration Summary Mockup

Application Registration Summary

* - Indicates required fields

Save and Return

Source: *****
- Select -

- Select -
BCCTP
CalHEERS
CBO
CDCR
College
Craig v Bonta
CSC
CWS
Drop Off
Email
Fax
ICT
IHSS/CMIPS II
In Person
LIS
Mail In Application
Other
Outreach
Outstation

App Date: ***** 01/01/2025   Case Number:

First Name: *****   MI: Social Security Number:
JOHN   123-45-6789

Gender: *****   Date of Birth:
Male   01/01/2001

Apt#:   City: County: State: ZIP Code:
1   City Name   San Diego   CA   92101

Apt#:   City: County: State: ZIP Code:
                     San Diego   CA

Figure 2.1.1 – Application Registration Summary

2.1.3   Description of Changes

1. Add the following values to the 'Source' field on the Application Registration Summary page:
   a. BCCTP
   a. LIS
   b. SSI/SSP Denial

Technical Note: This change will affect the values in CT294, so any page that displays 'Source' values using that code table will also display these new values.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Application Summary
- **Task:** Application Registration

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page has been assessed for accessibility requirements and meets accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

Update the existing automated regression test script(s) targeting the application 'Source' values to verify that the new values display on the following pages: Application Registration Summary, New / Reapplication Detail, New Programs Detail, Program History, Program History Detail.

Note: The MAGI Referral Detail page is out of scope.

2.2.2 Description of Change

Update the existing 'CF - Application Source' script to add the new 'Source' values to the verifications for each of the following pages:

1. Application Detail
2. Application Registration Summary
3. New / Reapplication Detail
4. New Programs Detail
5. Program History
6. Program History Detail

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.14.1.4	The LRS shall include multiple methods for searching and retrieving existing individual and case LRS Data, which will consist of the following: b. Case number; c. Legacy case number; d. CINs, names, addresses; e. Date of birth; f. SSN; k. Phone Number; l. Driver License ID; m. Email Address; n. Alias; p. A Number; q. License Plate Number; r. Application number; and s. YBN Application or Confirmation number.	This SCR will improve the accuracy of application source information when application data is searched and retrieved.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-277330

Update PB19E700 to require Money Management to be effective before Address change Effective date

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	Howard Suksanti, Adelaide Mendoza, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/4/2024	1.0	Initial Design	Edgars Reinholds
9/23/2024	1.1	Updated per LA County feedback	Edgars Reinholds

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1   OVERVIEW

This SCR will update the Daily Money Management GR EDBC Sweep.

1.1   Current Design

Daily Money Management GR EDBC Sweep (PB19E700) triggers EDBC and end dates Money Management Detail record.

Retroactive update will set the end date to Physical Address effective date (UPDATED_ON).

Proactive update will set the end date to Physical Address end date.

The above conditions are as per SCR CA-51959.

The issue occurs when Money Management Detail records is added with the same effective date as the as the physical address effective date and batch is also running on the same date.

SCR CA-51959 design states that the Money Management record has a future end date and record begin date is not in the future. For proactive address changes, batch will set Money Management end date to the last day of the month in which the participant's old physical address ends. Thus, in the above scenario where all dates are on the same day, the Money Management Detail record is updated with old physical address end date (last day of prior month) causing an invalid effective date range.

1.2   Requests

1. Amend PB19E700 to end date Money Management Detail record with previous address end date only if the Money Management Detail record began before the new address begin date takes effect.
2. Create an outreach list of the Money Management Detail records with invalid end date updated by PB19E700.

1.3   Overview of Recommendations

1. Update Daily Money Management GR EDBC Sweep (PB19E700) to validate Money Management Detail record is effective on or before the new end date of the previous address to perform the update.
2. Create an outreach list of the Money Management Detail records with invalid end date.

1.4 Assumptions

1. The sweep (PB19E700) criteria are not changing, only when to end date the Money Management Detail record.

2   RECOMMENDATIONS

2.1   Update Daily Money Management GR EDBC Sweep (PB19E700)

2.1.1   Overview

Update Daily Money Management GR EDBC Sweep (PB19E700) to validate Money Management Detail record is effective on or before the new end date of the previous address to perform the update.

2.1.2   Description of Change

1. Update Daily Money Management GR EDBC Sweep (PB19E700) to validate Money Management Detail record is effective on or before the new end date of the previous address to perform the update.

   For example, a case with active GA program and GR Housing vendor type where:
   a. Money Management Detail record is created with a begin date of 10/1/2024.
   b. Physical Address is updated with an effective date of 10/1/2024. Previous Physical Address end date is 9/30/2024.
   c. On 10/1/2024 batch run, the case would be picked up and the Money Management record would normally be end dated with the previous Physical Address end date of 9/30/2024. However, because the Money Management Detail begin date (10/01/2024) is not on or before the physical address new end date (09/30/2024), no update would be made to the Money Management Detail record. EDBC would still be triggered.

2.1.3   Execution Frequency

No Change.

2.1.4   Key Scheduling Dependencies

No Change.

2.1.5   Counties Impacted

Los Angeles County.

2.1.6   Category

Core.

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.1.4	The LRS shall provide validation based data entry to prevent duplication and inconsistencies in LRS Data.	Money Management Detail Dates will be updated only if the result is valid.

4   OUTREACH

4.1   Lists

Create an outreach list of the Money Management Detail records with invalid end date (end date is before begin date).

List Name: CA-277330 Invalid Money Management Detail Dates
List Criteria: Money Management Detail records with invalid dates (the Money Management Detail end date is at least one day before the begin date).
Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s): Money Management Begin Date, Money Management End Date
Frequency: One-time.

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-277330

California Statewide Automated Welfare System

Design Document

CA-278760

Phase 2 Data Growth – Journal – Contact Center APIs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	ZhaoA
	Reviewed By	KrishnamoorthyK

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/9/2024	1.0	Initial Draft	ZhaoA

1 OVERVIEW

This System Change Request (SCR) will enable Contact Center APIs which currently create journal entries to toggle between writing to the existing Oracle database and the new Postgres database.

1.1 Current Design

The following contact center APIs write journals directly to the existing JOURNAL_ENTRY table in the Oracle database.

1. Lookup Caller Phone SSN Info
2. Lookup Caller Phone DOB Info
3. Lookup Caller Phone DOB Pin Info
4. Case Lookup
5. SB Confirm Appointment
6. Set Appointment Reminder Complete
7. Cancel Appointment
8. Set Document Reminder Complete
9. Resend Form
10. Dynamic Prompts

1.2 Requests

Update the contact center APIs to be able to toggle between writing journals directly to the existing Oracle database or queuing requests to the journal lambda to write them to the journal table counterparts in the Postgres database. There are no functional changes to the APIs.

1.3 Overview of Recommendations

1. Add journal.service.enable property and environment level property values to control toggling of journal services at the environment level, which will be set to false by default.
2. Update the contact center APIs to read the journal.service.enable property value. If the value is set to false, the journal functionality is turned off for that environment, and the lambda should use existing logic to write journals to the Oracle database. If the value is set to true, the journal functionality is turned on for that environment, and the lambda should instead form a request payload and queue that for the journal lambda to write to the Postgres database.

1.4 Overview of Recommendations

1. Enablement of the journal service for contact center APIs will be aligned with enablement of the service for all other components under SCR CA-275489.
2. There are no functional changes to the Contact Center APIs.

2 RECOMMENDATIONS

This section outlines the recommendations to update the Contact Center APIs.

2.1 Add Journal Service Toggle Property

2.1.1 Overview

Journal service can be toggled on and off for Contact Center APIs at an environment level.

2.1.2 Description of Changes

1. Add journal.enable.service property to the Contact Center APIs, which will be used to toggle the journal service on and off.
2. Set the default value to false, including production.
3. Add environment level properties to allow the service to be controlled at an environment level.

2.2 Update the Contact Center APIs to use the new Journal Services

2.2.1 Overview

The following Contact Center APIs currently create journals by writing them directly to the Oracle database:

1. Lookup Caller Phone SSN Info
2. Lookup Caller Phone DOB Info
3. Lookup Caller Phone DOB Pin Info
4. Case Lookup
5. SB Confirm Appointment
6. Set Appointment Reminder Complete
7. Cancel Appointment
8. Set Document Reminder Complete
9. Resend Form
10. Dynamic Prompts

The APIs should be updated to read the journal service toggle property journal.service.enable and create the journal in the appropriate database.

2.2.2 Description of Changes

The Contact Center APIs will read in the value of the journal.service.enable property. If the property is set to false, the APIs should use the existing implementation to write journals directly to the Oracle database. If the property is set to true, the APIs will queue a

request to the Create Journal Lambda, which will write the journal to the Postgres database.

3   REQUIREMENTS

3.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.3.2.1.b	Growth of caseload, usage, and storage of LRS Data; and - Service Platform and Infrastructure	As journal tables have been moved in their entirety, components accessing journals should be update how they access those tables as well. This includes the Contact Center API changes described in this SCR.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-280771

Rename Begin Date and End Date on Disaster Services List and Disaster Services Detail Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Nick Pasin
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/10/2024	1.0	Initial Draft	Nick Pasin

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1   OVERVIEW

This SCR will update the Disaster Services List and Disaster Services Detail pages' 'Begin Date' and 'End Date' label names. This label is confusing to the user as it is not clear what the dates refer to.

1.1   Current Design

Disaster Services Detail is where information for a declared Disaster from the Disaster Services List page can be viewed and edited.

1.2   Requests

Update the Disaster Services List and Disaster Services Detail pages' "Begin Date" label to "Benefit Period Begin Date" and the "End Date" label to "Benefit Period End Date".

1.3   Overview of Recommendations

1. Rename the "Begin Date" label on Disaster Services List page to "Benefit Period Begin Date" and rename the "End Date" label on Disaster Services List page to "Benefit Period End Date"
2. Rename the "Begin Date" label on Disaster Services Detail page to "Benefit Period Begin Date" and rename the "End Date" label on Disaster Services Detail page to "Benefit Period End Date"

1.4   Assumptions

1. Label updates will not affect user permissions or data displayed

2   RECOMMENDATIONS

2.1   Disaster Services List page

2.1.1   Overview

The Disaster Services List page is currently used to view all disasters for the given county. This SCR will update this page's "Begin Date" and "End Date" labels to add clarity to what the dates are referring to.

Figure 2.1.1 – Disaster Services Detail Mockup

2.1.2   Description of Changes

1. Update the Disaster Services List page to rename the "Begin Date" label to "Benefit Period Begin Date"
2. Update the Disaster Services List page to rename the "End Date" label to "Benefit Period End Date"

2.1.3   Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Disaster Services

2.1.4   Security Updates

N/A

2.1.5 Page Mapping

Update existing page mapping on Disaster Services List to reflect label changes:

Begin Date → Benefit Period Begin Date
End Date → Benefit Period End Date

2.1.6 Page Usage/Data Volume Impacts

N/A

2.1.7 Accessibility

The following Accessibility enhancements have been identified:

- Page should contain a level-one heading (ensure that the beginning of a page's main content starts with a h1 element, and also to ensure that the page contains only one h1 element.)

2.2 Disaster Services Detail page

2.2.1 Overview

The Disaster Services Detail page is currently used to view detailed information from Disasters set up on the Disaster Services List page. This SCR will update this page's "Begin Date" and "End Date" labels to add clarity to what the dates are referring to.

Figure 2.1.1 – Disaster Services Detail Mockup

2.2.2 Description of Changes

1. Update the Disaster Services Detail page to rename the "Begin Date" label to "Benefit Period Begin Date"
2. Update the Disaster Services Detail page to rename the "End Date" label to "Benefit Period End Date"

2.2.3 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Disaster Services

2.2.4 Security Updates

N/A

2.2.5 Page Mapping

Update existing page mapping on Disaster Services Detail to reflect label changes:

Begin Date → Benefit Period Begin Date

End Date → Benefit Period End Date

2.2.6 Page Usage/Data Volume Impacts

N/A

2.2.7 Accessibility

The following Accessibility enhancements have been identified:

- Page should contain a level-one heading (ensure that the beginning of a page's main content starts with a h1 element, and also to ensure that the page contains only one h1 element.)

3   SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.1.3.3	The LRS shall track and store eligibility and financial information, including information regarding payments, checks, claims, issuances, and replacements. - General Functional Requirements	Rename the "Begin Date" label to "Benefit Period Begin Date" and the "End Date" label to "Benefit Period End Date" on Disaster Services List page.

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-280884

DCR for Placer, PVS One-Time Disposition Run.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Supritha Sundaram
	Reviewed By	Howard Suksanti, John Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/15/2024	1.0	Initial Draft	Supritha Sundaram
08/21/2024	1.1	Updated wording	Howard Suksanti

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OVERVIEW

The purpose of the SCR CA-280884 is to disposition all PVS Reports for Placer that have not been dispositioned from 2005-2012 to "No Impact".

1.1. Current Design

Placer County has approx. 59,723 PVS reports from 2005-2012 without dispositions.

1.2. Requests

Placer is requesting CalSAWS run a one-time data change to disposition all PVS Reports for Placer that have not been dispositioned from 2005-2012 to "No Impact".

1.3. Overview of Recommendations

Create a DCR to disposition all PVS Reports for Placer that have not been dispositioned from 2005-2012 to "No Impact".

1.4. Assumptions

No other records outside of the county and dates are modified.

2. RECOMMENDATIONS

2.1 Create a DCR to disposition PVS Reports from 2005-2012

2.1.1 Overview

1. Create a DCR to disposition all PVS Reports for Placer that have not been dispositioned from 2005-2012 to "No Impact".

2.1.2 Description of Change

Create a DCR to auto close PVS abstracts as No Impact for abstracts received between 2005-2012 for Placer County. Any Tasks in an Assigned or In Process Status that are associated to these PVS abstracts will be set to Void Status.

The abstracts criteria will be as following:
1. The abstract type will be PVS only.
2. The abstract will be from Placer County only.
3. The abstract dates will be 2005-2012.

4. There is no disposition record for the abstract.

The Disposition details will be as following:
1. The Disposition status is No Impact.
2. The Closure date is the date that the DCR runs.
3. The Created By of the record will be '92'.
4. The program will be all IEVS programs (CW, CAPI, MC, NB, RCA, GA/GR), active or otherwise.
5. AU Impact Code is NO.

Column values

Column Name	Column Value
case_id	case_id from interf_file
interf_file_id	id from interf_file
report_beg_date	sysdate
review_type_code	PV
review_stat_code	CL
au_impact_code	NO
closure_code	5J
last_revw_date	sysdate
closure_date	sysdate
pgm_code	pgm_code
created_by	92
updated_by	92

2.1.3 Execution Frequency

One time.

2.1.4 Key Scheduling Dependencies

N/A.

2.1.5 Counties Impacted

Placer.

2.1.6 Category

N/A.

2.1.7 Data Volume/Performance

Approximately 59,723 PVS records.

2.1.8 Failure Procedure/Operational Instructions

The existing error handling/operational procedure will be followed.

APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-281074

Upgrade iText to version 8

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Kenneth J. Lerch

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/03/2024	1.0	Initial Draft	Kenneth J. Lerch

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1 OVERVIEW

This SCR describes the required changes to upgrade iText library to version 8.

1.1 Current Design

CalSAWS online and batch applications use iText v2 for forms.

1.2 Requests

Upgrade the iText library used by CalSAWS to version 8. Change the Forms Handling Architecture and Application code to use version 8 of the iText API.

1.3 Overview of Recommendations

Upgrading to the iText version 8 API will require some code changes due to the API differences between version.

1.4 Assumptions

- This upgrade should not change the functional behavior of the CalSAWS application.
- This upgrade should not impact the performance of the CalSAWS application.

2 RECOMMENDATIONS

2.1 Description of Changes

The following section outlines the required changes to the CalSAWS application.

2.1.1 Upgrade iText Library

Upgrade iText jar to version 8 in CalSAWS application.

2.1.2 Architecture framework changes

The CalSAWS application's Forms generation and handling frameworks will be updated to use the new iText v8 API. The required architecture wrapper libraries will be updated. The generation, editing, printing and bundling of forms functionality should remain unchanged.

3   SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4   REQUIREMENTS

N/A

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5   MIGRATION IMPACTS

N/A

6   OUTREACH

N/A

7 APPENDIX

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-281111

Update the CCP 7 to the 5/2024 Version

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/20/2024	1.0	Initial Draft	Sindhuja Thiagarajan

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1 OVERVIEW

The purpose of this change is to update CCP 7 (10/19) CalWORKs Child Care Request Form and Child Care Payment Rules to the newest state version (5/24) in CalSAWS Template Repository.

1.1 Current Design

Currently the CCP 7 (10/19) is available in CalSAWS in English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

1.2 Requests

1. Update the CCP 7 that exists in CalSAWS Template Repository to match the newest State version (5/24).
   Languages Include: English, Spanish, Armenian, Chinese, Farsi and Vietnamese.
2. Turn off CCP 7 (10/19) version of threshold languages.
   Languages Include: Arabic, Cambodian, Hmong, Korean, Lao, Russian and Tagalog.

1.3 Overview of Recommendations

1. Update the CCP 7 that exists in CalSAWS Template Repository to match the newest State version (5/24).
   Languages Include: English, Spanish, Armenian, Chinese, Farsi and Vietnamese.
2. Turn off CCP 7 (10/19) version of threshold languages.
   Languages Include: Arabic, Cambodian, Hmong, Korean, Lao, Russian and Tagalog.

1.4 Assumptions

1. All fields (blank or prepopulated) will be editable.
2. There are no changes to the generation logic of these forms.
3. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Update the CCP 7 to latest version (5/24) in English and threshold languages.

2.1.1   Overview

This effort will update the CCP 7 to newest state version (5/24) in English and threshold languages.

State Form: CCP 7 (5/24)
Programs: Child Care, CalWORKs
Attached Forms: N/A
Form Number: CCP 7
Forms Category: Forms
Template Repository Visibility: All Counties
Form Title (Document List Page Displayed Name): CalWORKs Child Care Request Form and Child Care Payment Rules
Template Description: This form is used for CalWORKs Stage One Child Care Authorization
Existing Languages: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

2.1.2   Form Verbiage

Update CCP 7 XDP

Existing CCP 7 xdps will be updated for the latest version (5/24) in English and threshold languages.

Threshold Languages: Spanish, Armenian, Chinese*, Farsi and Vietnamese.

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

Include NA Back 9: No
Imaging Form Name: CW Stage 1 Child Care Request & Payment
Imaging Document Type: Child Care
Imaging Case/Person: Case

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Mockups/Examples: See supporting document #1

2.1.3   Form Variable Population

N/A

2.1.4 Form Generation Conditions

The CCP 7 (5/24) can be generated via Template Repository.

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 CCP 7 (5/24)

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 CCP 7
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 CCP 7 Form
Post to Self-Service Portal	Y

2.2 Turn off CCP 7 (10/19) version of threshold languages.

2.2.1 Overview

This effort will turn off the CCP 7 (10/19) in existing seven threshold languages.

Form Number: CCP 7
Existing Languages: English, Spanish, Armenian, Cambodian, Arabic, Chinese, Farsi, Korean, Hmong, Lao, Russian, Tagalog and Vietnamese.

2.2.2 Form Verbiage

N/A

2.2.3 Form Generation Conditions

Turn off the CCP 7 (10/19) form CalSAWS Template Repository in existing seven threshold languages mentioned in the below table.

Form Number	Form Name	Threshold Languages
CCP 7	CalWORKs Child Care Request Form and Child Care Payment Rules	Arabic, Cambodian, Hmong, Korean, Lao, Russian and Tagalog

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	CCP 7 - CalWORKs Child Care Request Form and Child Care Payment Rules	CCP7_English CCP7_Spanish CCP7_Chinese CCP7_Armenian CCP7_Farsi CCP7_Vietnamese

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;	CCP 7 is being updated with latest version for 6 existing languages and turned of seven existing threshold languages.

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.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-283039

Update Spanish and Chinese AAP3 Form to
Latest Revision

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Prashanth Kumar
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/27/2024	1.0	Initial Draft	Prashanth Kumar

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1 OVERVIEW

The purpose of this SCR is to update the AAP 3 Reassessment Information - Adoption Assistance Program to latest state version (6/22) in Spanish and to add Chinese language to CalSAWS Template Repository.

1.1 Current Design

Currently the AAP 3 is available in English with the version (6/22) and Spanish with the version (2/22) in CalSAWS Template Repository.

1.2 Requests

1. Update AAP 3 form to latest State version (6/22) in CalSAWS Template Repository.
   Languages Include: Spanish.
2. Add AAP 3(6/22) form in threshold languages to the CalSAWS Template Repository.
   Languages Include: Chinese.

1.3 Overview of Recommendations

1. Update AAP 3 form to latest State version (6/22) in CalSAWS Template Repository.
   Languages Include: Spanish.
2. Add AAP 3(6/22) form in threshold language to the CalSAWS Template Repository.
   Languages Include: Chinese.

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. There are no changes to the generation logic of these forms.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Update AAP 3 to latest version (6/22) in CalSAWS Template Repository.

2.1.1 Overview

This effort will update AAP 3 form to latest state version (6/22) in Spanish.

State Form: AAP 3(6/22)
Programs: Adoption Assistance Program (AAP)
Attached Forms: N/A

Form Number: AAP 3
Forms Category: Forms
Template Repository Visibility: All Counties
Form Title (Document List Page Displayed Name): Reassessment
Information - Adoption Assistance Program
Template Description: This form is used to reasses information for the
Adoption Assistance Program.
Existing Languages: English, Spanish.

2.1.2 Form Verbiage

Update AAP 3 XDPs

Existing AAP 3 XDP will be updated for the latest version (6/22).

Languages Include: Spanish.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Include NA Back 9: No
Imaging Form Name: Reassessment Info - AAP
Imaging Document Type: Adoption Assistance Program (AAP)
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 AAP 3 (6/22) form can be generated via Template Repository.

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

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Form Print Options and Mailing Requirements

The following are the print and mailing requirements for AAP 3 (6/22)

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 AAP 3 form
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 AAP 3 Form
Post to Self-Service Portal	N

2.2 Add AAP 3 (6/22) in threshold language to the Template Repository.

2.2.1 Overview

This effort will add additional threshold language to AAP 3 (6/22) in CalSAWS Template Repository.

State Form: AAP 3 (6/22)
Programs: Adoption Assistance Program (AAP)
Attached Forms: N/A
Form Number: AAP 3
Forms Category: Forms
Template Repository Visibility: All Counties
Form Title (Document List Page Displayed Name): Reassessment Information - Adoption Assistance Program
Template Description: This form is used to reasses information for the Adoption Assistance Program.
Existing Languages: English, Spanish.

2.2.2 Form Verbiage

Create AAP 3 XDPs

A new XDP will be created for AAP 3 (6/22) in threshold languages.

Threshold Languages: Chinese.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Include NA Back 9: No
Imaging Form Name: Reassessment Info - AAP
Imaging Document Type: Adoption Assistance Program (AAP)
Imaging Case/Person: Case
Form Mockups/Examples: See supporting document #2

2.2.3 Form Variable Population

N/A

2.2.4 Form Generation Conditions

The AAP 3 (6/22) can be generated via Template Repository.

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

Update Dynamic Form generation batch jobs

Update Dynamic Form generation batch job PB19R518 to generate the AAP 3 in newly added Chinese language.

Tech Note: Update CT942_087

Form Control

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	N	Y

Form Print Options and Mailing Requirements

The following are the print and mailing requirements for AAP 3 (6/22)

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 AAP 3 form
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 AAP 3 Form
Post to Self-Service Portal	N

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	AAP 3 – Reassessment Information – Adoption Assistance Program	AAP_3_Spanish.pdf
2	Forms	AAP 3 – Reassessment Information – Adoption Assistance Program	AAP_3_Chinese.pdf

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.3 CAR-1207	The LRS shall include the ability to add threshold languages for written material, including notices, NOAs, forms, flyers, letters, and stuffers, as required by COUNTY, as well as for any other language for which the State provides a translation. - Client Correspondence - 2.18.1.3	AAP 3 is being updated with latest version for Spanish and added Chinese language.