

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200644

Update Person Configuration and Claiming for
Aid Codes 3U and 3W

| | | |
|----------------|----------------------------------|----------------------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Eric Wu, Sridhar Mullapudi |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|--|----------------------------|
| 07/28/2024 | 1.0 | Initial Draft | Eric Wu, Sridhar Mullapudi |
| 10/18/2024 | 1.1 | Content Revision: Added new recommendation to display existing mixed aid code validation for '3U' and '3W' | Sridhar Mullapudi |
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1 OVERVIEW

1.1 Current Design

CalWORKs determines the individual claiming to be 'federal' or 'Non-Federal' as follows:

If the program member qualifies for any of the following criteria, Federal Funding is determined else "Non-Federal" funding is determined.

1. Determine if the person's country of birth is the 'United States (US)', the person is a US citizen born abroad, or the person is a naturalized citizen.
2. Determine if the person is unconditionally federally eligible as indicated by their 'INS documents'.
3. Determine if the person qualifies because of military information (Meets Veteran Status Active-Duty indicator on Citizenship set to 'Yes' or person is a lawful permanent resident veteran as indicated by his document code and section code).
4. Determine if the person is a 'Lawful Permanent Resident (LPR)' as indicated by document type and section code and qualifies for 40 quarters (40 qualifying work quarters indicator on Citizenship set to 'Yes').
5. Determine if the person meets one of the following conditions:
 - a. Person is a Parolee or Conditional Entrant as indicated by their 'INS documents'.
 - b. Person is a 'Lawful Permanent Resident (LPR)' as indicated by his document code and section code, and does not qualify for 40 quarters (40 qualifying work quarters indicator on Citizenship set to 'No').
 - c. Person is battered (their battered alien indicator is 'Yes' or the person is a battered lawful permanent resident as indicated by his document and section code).
6. Determine if the person's Country Entry Date or INS Document Issue Date before 8/22/1996.
7. Determine if person's Country Entry Date or INS Document Issue Date is at least 5 years prior to the begin date of the 'Benefit Month.' (if neither date has been set, the system will assume that the both dates are more than 5 years prior to the begin date of the 'Benefit Month').

After the claiming determination EDBC logic overrides the individual claiming to 'Non-Federal' if the aid code for the program is marked as 'non-federal' (CT184 Refer_TABLE_4_DSCR).

Aid codes 3U and 3W are marked as Non-Federal for claiming. EDBC logic determines claiming for individual members in the Assistance Unit (AU) as 'non-federal'.

1.2 Requests

Aid Codes '3U' and '3W' are mixed aid code that requires at least one fed (citizen or qualified alien) aided person and one non fed aided person in the AU.

However, despite being mixed code the AU should be claimed to State for funding.

1.3 Overview of Recommendations

1. Update Claiming Drop Down Values on Program Configuration [Override] Detail' Page for '3U' and '3W' aid codes.
2. Update Eligibility to treat aid codes 3U and 3W as a mixed aid code for person counts configuration.
3. Updated EDBC logic when overriding to '3U' or '3W' to display the existing validation if person claiming is not mixed claiming for the AU.

1.4 Assumptions

1. Fiscal claiming for 3U and 3W aid codes shall continue to be claimed as 'Non-Federal'.

2 RECOMMENDATIONS

2.1 Update Claim Code Drop Down Values on Program Configuration [Override] Detail' Page.

2.1.1 Overview

When displaying the claim code drop down values on the Program Configuration [Override] Detail' page for 3U and 3W aid codes, display both 'Federal' and 'Non-Federal' options.

2.1.2 Program Configuration [Override] Detail' Page Mockup

Program Configuration Detail

*- Indicates required fields

Save and Return Cancel

| System Determination | | | | |
|----------------------|-------|--------------|---------|----------------|
| Name: | Role: | Role Reason: | Status: | Status Reason: |
| Test, Test 14M | MEM | | Active | |

User Override

Name: Test, Test 14M

Role: * MEM

Role Reason: [dropdown]

Status: * Active

Status Reason: [dropdown]

Claiming Code: [dropdown]

Adult Child Code: Child

Save and Return Cancel



Figure 2.1.1 – Mockup Name

2.1.3 Description of Changes

1. Update the claim code options for CalWORKs program with '3U' or '3W' aid codes to display the following options:
 - a. Federal
 - b. Non Federal

2.1.4 Page Location

- **Global: Customer Information**
- **Local: Run EDBC/Manual EDBC**
- **Task: EDBC Summary Page**

2.1.5 Security Updates

None.

2.1.6 Page Mapping

None.

2.1.7 Accessibility

None.

2.1.8 Page Usage/Data Volume Impacts

None.

2.2 Update EDBC Claiming Determination Logic

2.2.1 Overview

Update individual claiming code determination logic for all Members in the CalWORKs AU with aid codes '3U' and '3W' to be 'Federal' or 'Non-Federal'.

2.2.2 Description of Changes

1. Update EDBC logic to determine individual member claim code determination logic for CalWORKs aid codes '3U' and '3W' to determine if the individual is 'Federal' or 'Non-Federal' claiming following the existing functionality outlined in section 1.1.

Note: This recommendation shall not update the CT184 Refer_TABLE_4_DSCR for '3U' and '3W' aid codes. This column is also used by Fiscal for claiming the AU's aid payment and shall continue to use this column value of non-federal for claiming aid payment.

Technical note: Update EDBC logic when overriding the aid code to '3U' or '3W' to not override the claiming to 'Non-Federal' for the AU members. The logic shall retain EDBC determination if user does not set person claiming on the Program Configuration Override Detail page.

2.2.3 Programs Impacted

CalWORKs

2.2.4 Performance Impacts

None.

2.3 Program Configuration [Override] List - Update Existing Aid Code validation for '3U' and '3W'.

2.3.1 Overview

Update the program configuration [Override] list page to display existing aid code validation when selecting a mixed aidcode and person claim code is not mixed claiming for the AU.

2.3.2 Program Configuration [Override] Detail' Page Mockup

Program Configuration Override List

*- Indicates required fields

Save and Return

Cancel

- **Aid Code** - The Claim Code is dependent on the Aid Code. The selected aid code requires a household with mixed claim codes.

| | |
|-------------------------|--|
| EDBC Override Reason: * | <input type="text" value="Administrative Decision"/> |
|-------------------------|--|

| System Determination | |
|------------------------|-------------------------------|
| EDBC Source Code: | Online EDBC Rules |
| Aid Code: | |
| Program Status: | <input type="text" value=""/> |
| Program Status Reason: | |
| Reporting Type: | |
| Reporting Type Reason: | |

| User Override | | |
|------------------------|---|--------------------------------------|
| Aid Code: * | <input type="text" value="3U - CW-Two Parent (State)"/> | <input type="button" value="Clear"/> |
| Aid Code Reason: | <input type="text" value=""/> | |
| Program Status: | <input type="text" value="Active"/> | |
| Program Status Reason: | <input type="text" value=""/> | |
| Reporting Type: | <input type="text" value="Semi-Annual Reporting"/> | |
| Reporting Type Reason: | <input type="text" value=""/> | |

Figure 2.3.1 – Program Configuration Override List

2.3.3 Description of Changes

1. Update Program Configuration [Override] List page to display the existing validation upon save and continue when the user selects the aid code '3U' or '3W' and the program person claiming does not contain at least one 'Federal' and one 'Non-Federal' claiming. Message: 'The Claim Code is dependent on the Aid Code. The selected aid code requires a household with mixed claim codes.'

2.3.4 Page Location

- Global: Customer Information
- Local: Run EDBC/Manual EDBC
- Task: EDBC Summary Page

2.3.5 Security Updates

None.

2.3.6 Page Mapping

None.

2.3.7 Accessibility

None.

2.3.8 Page Usage/Data Volume Impacts

None.

3 REQUIREMENTS

3.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|---------|---|---|
| 2.8.1.1 | The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention. - Eligibility Determination and Benefit Calculation (EDBC) | EDBC shall determine accurate individual funding for '3U' and '3W' aid codes. |
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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-260329

Add Outbound Call Option for Telephonic
Signature

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---------|---------------------------|--------------------------------|
| | Prepared By | Gerald Limbrick, Jared Kuester |
| | Reviewed By | Michael Wu, Raji Sanuvala |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------------|------------------|---|--------------------------|
| 5/22/2024 | 0.1 | Draft | G. Limbrick |
| 5/29/2024 | 0.2 | Draft added Call Flows | J. Kuester., G. Limbrick |
| <u>08/29/2024</u> | <u>1.0</u> | <p><u>Content Revision:</u></p> <ol style="list-style-type: none"> <u>1. Section 2.2.2 added the mockup for the full page of the Electronic Signature Document Detail page.</u> <u>2. Section 2.2.3 the requirement to update the text to be Transcription Disabled (on the text field found on the Audio and Transcription section) is removed as this is something that is in Production already.</u> <ol style="list-style-type: none"> <u>a. The requirement to update the Signature History section is written as well (copied from Section 2.1.3) instead of having it state to just reference Section 2.1.3</u> <u>3. Section 2.4.2. Figure 2.4.2.2 (Collect DOB Call Flow) it's updated as it is Loop = 2 instead of Loop = 10. This was reviewed with Jared (confirmed that the information on the Visio is also Loop = 2)</u> <u>4. Section 2.4.3 added the note to reference the newly added Section 3 (Supporting document) for all the IVR flow in details.</u> <u>5. Added Section Supporting document as it include the IVR flows in visio/PDF</u> <u>6. Migration Requirement section</u> | <u>Kusnadi.E</u> |

| | | | |
|--|--|--|--|
| | | <u>is removed as it's not applicable.</u> <u>7. Updated the Project Requirement.</u> <u>8. Section for Migration Impacts and Appendix was remove as well as its not applicable</u> | |
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1 OVERVIEW

The Telephonic Signature IVR (Interactive Voice Response application) has the capability to make an outbound call. This SCR will add the option to dial into the Telephonic Signature IVR.

1.1 Current Design

Telephonic Signatures can be completed (when not using the eCCP) by entering in a phone number into the Electronic Signature Page. The Telephonic Signature IVR calls the number, and the signature is captured as the user follows the prompts.

Some Counties do not have direct dial numbers, or they don't have phone systems that allow for direct dial, without entering phone extensions. AWS Connect does not accept phone extensions, to allow the IVR to call workers with phone extensions.

1.2 Requests

Add an Outbound Call option, for Telephonic Signatures, for staff or phone systems that have phone number extensions or that do not allow for direct dial. Currently AWS Connect does not allow for the entering in of phone extensions.

1.3 Overview of Recommendations

1. Remove the "ext." (extension) field from the Electronic Signature Page and the Electronic Signature Document Detail page.
2. Add functionality to store and display a phone number on the Electronic Signature page, allowing users to dial into the IVR, to complete a Telephonic Signature.
3. Add a new 'Call Method' dropdown so the user can choose how the IVR will be contacted.
4. Update the Person table for Electronic Signatures where the 'Signature Method' is "Telephonic" so that the following elements are displayed/hidden dynamically based on the 'Call Method':
 - a. The 'Phone Number' column(s) (re-labeled, it was 'Value')
 - The 'Capture Code' column(s)
 - b. The 'Copy' button(s)
 - c. The 'Call' button(s)
5. Update the Person table for Electronic Signatures where the 'Signature Method' is "IVR/Text"; re-label the 'Value' column as 'Phone Number' and show associated IVR phone number.
6. When "eCCP" is the selected 'Call Method', update the 'Rights and Responsibilities' wording, below the Person table, to: "Please use a Quick Connect to read an R&R script."

7. Update the Electronic Signature Page's Audio and Transcript text areas with place holder text "Transcription Disabled"
8. Update the Electronic Signature Page's History Section(s) with the new 'Phone Number' Column
9. Update the Electronic Signature Document Detail Page's Audio and Transcript text areas with place holder text "Transcription Disabled"
10. Update the Electronic Signature Document Detail Page's History Section(s) with the new 'Phone Number' Column
11. Correct listed Accessibility issues
12. Create a new lambda to retrieve Electronic Signature details for a specific Capture Code.
13. Add a new Call Flow to:
 - a. Accept an incoming Telephonic Signature call
 - b. Validate a provided Capture Code and use it to retrieve Electronic Signature details and associated Person/Case details
 - c. Transfer the call into the existing **Telephonic Signature – Collect D.O.B.** Call flow, to complete the signature capture.
14. Update the **Telephonic Signature – Collect D.O.B.** Call flow to:
 - a. Prompt the caller to press a key when ready to begin the Rights and Responsibilities script; this will allow time to conference a customer into the call
 - b. Set the customer's expectations that the Rights and Responsibilities takes about 13 minutes instead of 3 minutes

1.4 Assumptions

1. Fields and functionality not mentioned will not be changed.

2 RECOMMENDATIONS

2.1 Electronic Signature Page

2.1.1 Overview

This page allows workers to assist a participant to electronically sign a document. The Telephonic Signature IVR calls a user; there is no Phone Number available allowing a user to call into the Telephonic Signature IVR. The Ext. (extension) field is not usable. The 'Phone Number' associated with an electronic signature is not displayed in the history unless the "Text" signature method was used.

Remove the Ext. (extension) field.

Add a 'Call Method' dropdown and functionality to display a phone number on the page, allowing users to dial into the IVR, to complete a Telephonic Signature.

Update the Signature History Section(s) to show the 'Phone Number' associated with the Telephonic Signature Call or the IVR 'Phone Number' used for the "IVR/Text" 'Signature Method'

2.1.2 Electronic Signature Page Mockup

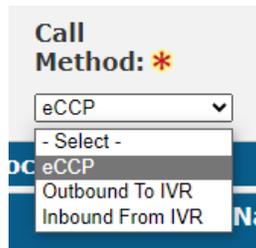


Figure 2.1.2.1 - Call Method Dropdown

CalSAWS Case Name: Case Name Case Number: L39CD92

 Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Electronic Signature

* - Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: [Generate Form](#)

| | | | | |
|----------------------------|-----------------------|--------------------------------|----------------------|-------------------|
| Signature Method: * | Call Method: * | Number of Signatures: * | Worker Name: | Worker ID: |
| Telephonic | eCCP | 2 | First_Name Last_Name | 90AS00AL6Q |

| Associated Documents | | | | | |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Remove Add Document(s)

Please use a Quick Connect to read an R&R script.

| Person * | Date of Birth | Capture Code | Status |
|----------------------|---------------|--------------|----------|
| Filkey, Darian 70M | 02/09/1954 | | Not Sent |
| FILKEY, LISANDRA 58F | 12/12/1965 | | Not Sent |

Save Cancel

Figure 2.1.2.2 - eCCP Call Method (Documents and Persons Not Saved)

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Distributed Documents

Electronic Signature

* Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: [Generate Form](#)

Signature Method: * Telephonic Call Method: * eCCP Number of Signatures: * 2 Worker Name: First_Name Last_Name Worker ID: 90AS00AL6Q

Associated Documents

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | <input type="checkbox"/> |

[Remove](#) [Add Document\(s\)](#)

Please use a Quick Connect to read an R&R script.

| Person | Date of Birth | Capture Code | Status |
|---|---------------|-------------------------------|----------|
| <input type="checkbox"/> Filkey, Darian 70M | 02/09/1954 | 20508654 Copy | Not Sent |
| <input type="checkbox"/> FILKEY, LISANDRA 58F | 12/12/1965 | 20508655 Copy | Not Sent |

[Remove](#)

Audio and Transcript

Filkey, Darian 70M 

Transcription Disabled

FILKEY, LISANDRA 58F

Transcription Disabled

Signature History - EBT 2259

Document Name: [REPORT OF ELECTRONIC THEFT OF BENEFITS \(ENG\)](#)

Filkey, Darian 70M

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

FILKEY, LISANDRA 58F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

[Save](#) [Cancel](#)

Figure 2.1.2.3 - eCCP Call Method (Documents and Persons Saved)

CalSAWS Case Name: Case Name Case Number: L39CD92 Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Distributed Documents

Electronic Signature

* - Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Signature Method: * Call Method: * Number of Signatures: * Worker Name: Worker ID:

Associated Documents

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | <input type="checkbox"/> |

Check to Read Rights and Responsibilities in the Telephonic Signature IVR

| Person | Date of Birth | Capture Code | Phone Number | Status |
|---|---------------|--------------|--------------|----------|
| <input type="text" value="Filkey, Darian 70M"/> | 02/09/1954 | | | Not Sent |
| <input type="text" value="FILKEY, LISANDRA 58F"/> | 12/12/1965 | | | Not Sent |

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CalSAWS Case Name: Case Name Case NumbeL39CD92

 Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles AT1

 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Electronic Signature

* Indicates required fields
 Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:

| | | | | |
|----------------------------|-----------------------|--------------------------------|----------------------|-------------------|
| Signature Method: * | Call Method: * | Number of Signatures: * | Worker Name: | Worker ID: |
| Telephonic | Outbound To IVR | 2 | First_Name Last_Name | 90AS00AL6Q |

| Associated Documents | | | | | |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Select Rights and Responsibilities to Read in the Telephonic Signature IVR: *
 N/A

| Person * | Date of Birth | Capture Code | Phone Number | Status |
|----------------------|---------------|--------------|--------------|----------|
| Filkey, Darian 70M | 02/09/1954 | | | Not Sent |
| FILKEY, LISANDRA 58F | 12/12/1965 | | | Not Sent |

Figure 2.1.2.4 – Outbound to IVR Call Method (Documents and Persons Not Saved)

Distributed Documents

Electronic Signature

*- Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:

Generate Form

| | | | | |
|---------------------|-----------------|-------------------------|----------------------|------------|
| Signature Method: * | Call Method: * | Number of Signatures: * | Worker Name: | Worker ID: |
| Telephonic | Outbound To IVR | 2 | First_Name Last_Name | 90AS00AL6Q |

Associated Documents

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|--------------------|--|----------|-----------------------------------|-----------------|--------------------------------|
| 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Remove Add Document(s)

Check to Read Rights and Responsibilities in the Telephonic Signature IVR

| Person | Date of Birth | Capture Code | Phone Number | Status |
|----------------------|---------------|--------------|----------------|----------|
| Filkey, Darian 70M | 02/09/1954 | 20508654 | 1-800-555-1234 | Not Sent |
| FILKEY, LISANDRA 58F | 12/12/1965 | 20508655 | 1-800-555-1234 | Not Sent |

Remove

Audio and Transcript

Filkey, Darian 70M
Transcription Disabled

FILKEY, LISANDRA 58F
Transcription Disabled

Signature History - EBT 2259

Document Name: REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG)

Filkey, Darian 70M

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

FILKEY, LISANDRA 58F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

Save Outbound Cancel

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Distributed Documents

Electronic Signature

* - Indicates required fields
 Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:

Signature Method: * Call Method: * Number of Signatures: * Worker Name: Worker ID:

Associated Documents

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Select Rights and Responsibilities to Read in the Telephonic Signature IVR: *
 Combined MC and CW/CF

| Person * | Date of Birth | Capture Code | Phone Number | Status |
|---|---------------|--------------|----------------|----------|
| <input type="checkbox"/> Filkey, Darian 70M | 02/09/1954 | 20508654 | 1-800-555-1234 | Not Sent |
| <input type="checkbox"/> FILKEY, LISANDRA 58F | 12/12/1965 | 20508655 | 1-800-555-1234 | Not Sent |

Audio and Transcript

Filkey, Darian 70M 

Transcription Disabled

FILKEY, LISANDRA 58F

Transcription Disabled

Signature History - EBT 2259

Document Name: [REPORT OF ELECTRONIC THEFT OF BENEFITS \(ENG\)](#)

Filkey, Darian 70M

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

FILKEY, LISANDRA 58F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

Figure 2.1.2.5 - Outbound to IVR Call Method (Documents and Persons Saved)

CalSAWS Case Name: Case Name Case Number: L39CD92 Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Electronic Signature

* - Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Signature Method: * Call Method: * Number of Signatures: * Worker Name: Worker ID:

Associated Documents

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Check to Read Rights and Responsibilities in the Telephonic Signature IVR

| Person | Date of Birth | Capture Code | Phone Number | Status |
|---|---------------|--------------|--------------|----------|
| <input type="text" value="Filkey, Darlan 70M"/> | 02/09/1954 | | | Not Sent |
| <input type="text" value="FILKEY, LISANDRA 58F"/> | 12/12/1965 | | | Not Sent |

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Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Distributed Documents

Electronic Signature

* Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:

Signature Method: * Call Method: * Number of Signatures: * Worker Name: First_Name Last_Name Worker ID: 90AS00AL6Q

| Associated Documents | | | | | |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Select Rights and Responsibilities to Read in the Telephonic Signature IVR: *
(Combined MC and CW/CF)

| Person | Date of Birth | Capture Code | Phone Number | Status |
|----------------------|---------------|--------------|--------------|----------|
| Filkey, Darian 70M | 02/09/1954 | | | Not Sent |
| FILKEY, LISANDRA 58F | 12/12/1965 | | | Not Sent |

Figure 2.1.2.6 – Inbound From IVR Call Method (Documents and Persons Not Saved)

CalSAWS Case Name: Case Name Case Number: 39CD92 Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports **Client Corresp.** Admin Tools

Distributed Documents

Electronic Signature

*** - Indicates required fields**
 Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:
 Generate Form

Signature Method: * Telephonic **Call Method:** * Inbound From IVR **Number of Signatures:** * 2 **Worker Name:** First_Name Last_Name **Worker ID:** 90AS00AL6Q

Associated Documents

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Remove Add Document(s)

Check to Read Rights and Responsibilities in the Telephonic Signature IVR

| Person | Date of Birth | Capture Code | Phone Number | Status |
|---|---------------|--------------|---|----------------------------|
| <input type="checkbox"/> Filkey, Darian 70M | 02/09/1954 | 20508654 | <input type="text" value="012 345 6789"/> | Not Sent Call |
| <input type="checkbox"/> FILKEY, LISANDRA 58F | 12/12/1965 | 20508655 | <input type="text" value="012 345 6789"/> | Not Sent Call |

Remove

Audio and Transcript

Filkey, Darian 70M
 Transcription Disabled 

FILKEY, LISANDRA 58F
 Transcription Disabled

Signature History - EBT 2259

Document Name: REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG)

Filkey, Darian 70M

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

FILKEY, LISANDRA 58F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

Save Cancel

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Electronic Signature

* - Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:

Signature Method: * Telephonic Call Method: * Inbound From IVR Number of Signatures: * 2 Worker Name: First_Name Last_Name Worker ID: 90AS00AL6Q

| Date | Document Name | Number | Program | Status | Viewed Via Self-Service Portal |
|---|--|----------|-----------------------------------|-----------------|--------------------------------|
| <input type="checkbox"/> 02/29/2024 7:00 PM | REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | EBT 2259 | General Assistance/General Relief | Printed Locally | |

Select Rights and Responsibilities to Read in the Telephonic Signature IVR: *
Combined MC and CW/CF

| Person * | Date of Birth | Capture Code | Phone Number | Status |
|---|---------------|--------------|--------------|--|
| <input type="checkbox"/> Filkey, Darian 70M | 02/09/1954 | 20508654 | 012 345 6789 | Not Sent <input type="button" value="Call"/> |
| <input type="checkbox"/> FILKEY, LISANDRA 58F | 12/12/1965 | 20508655 | 012 345 6789 | Not Sent <input type="button" value="Call"/> |

Audio and Transcript

Filkey, Darian 70M 

Transcription Disabled

FILKEY, LISANDRA 58F

Transcription Disabled

Signature History - EBT 2259

Document Name: [REPORT OF ELECTRONIC THEFT OF BENEFITS \(ENG\)](#)

Filkey, Darian 70M

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

FILKEY, LISANDRA 58F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------|-----------------|
| 02/29/2024 07:03:33 PM | Telephonic | | Not Sent | 03/03/2024 |

Figure 2.1.2.7 - Inbound from -IVR Call Method (Documents and Persons Saved)

CalSAWS Case Name: Case Name Case Number: L39CD92 Journal Tasks Help Resources Page Mapping Imaging Log Out

Los Angeles AT1 Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Distributed Documents

Electronic Signature

*- Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language:

| | | | |
|----------------------------|--------------------------------|----------------------|-------------------|
| Signature Method: * | Number of Signatures: * | Worker Name: | Worker ID: |
| IVR/Text | 2 | First_Name Last_Name | 90AS00AL6Q |

| Person * | Date of Birth | Signature Capture Type * | Capture Code | Phone Number | Status |
|---|---------------|--------------------------|--------------|----------------------|--|
| <input type="checkbox"/> Filkey, Darian 70M | 02/09/1954 | IVR | 123456 | 1 855-702-1815 | Sent <input type="button" value="Resend"/> |
| <input type="checkbox"/> FILKEY, LISANDRA 58F | 12/12/1965 | Text | | Home - (892)780-1057 | Sent <input type="button" value="Resend"/> |

Signature History - EBT 2259

Document Name: REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG)

Filkey, Darian 70M

| Date/Time | Signature Capture Type | Capture Code | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------------|--------|-----------------|
| 02/29/2024 07:04:11 PM | IVR | 123456 | 1 855-702-1815 | Sent | 03/03/2024 |

FILKEY, LISANDRA 58F

| Date/Time | Signature Capture Type | Capture Code | Phone Number | Status | Expiration Date |
|------------------------|------------------------|--------------|----------------------|--------|-----------------|
| 02/29/2024 07:03:33 PM | Text | | Cell - (892)780-1057 | Sent | 03/03/2024 |

This Type 1 page took 0.65 seconds to load.

Figure 2.1.2.8 - IVR/Text Signature Method – (Documents and Persons Saved)

2.1.3 Description of Changes

1. Remove the Required Field Indicator (*) from the 'Language' dropdown. **Note:** this is the dropdown that controls the "I declare under penalty of perjury" form.
2. Add a 'Call Method' dropdown selector, with a Required Field indicator (*):
 - a. Add options:
 - i. "eCCP"
 - ii. "Outbound to IVR"
 - iii. "Inbound from IVR"

- b. Only show this dropdown when/if "Telephonic" is selected for the 'Signature Method' dropdown
 - c. Add a validation message, triggered on the 'Save' button as: as: "Call Method – Please select an option." Clicking a link on the message text will put focus on this dropdown
3. When "eCCP" is the selected 'Call Method':
- a. Update the 'Rights and Responsibilities' wording, below the 'Associated Documents' table, to: "Please use a Quick Connect to read an R&R script."
 - b. Hide/remove the ~~dropdown checkbox~~ for selecting Rights and Responsibilities ~~(or dropdown~~ **Note: SCR CA-245360 is tracking a change of the element from a checkbox to a dropdown)**
4. Update the Person table for Electronic Signatures, when the 'Signature Method' "Telephonic" is selected:
- a. Remove the 'ext.' (extension) input field from the 'Value' Column
 - b. When the 'Call Method' "eCCP" is selected:
 - i. Hide the 'Value' column
 - ii. Hide the 'Call' button
 - c. When the 'Call Method' "Outbound To IVR" is selected:
 - i. Hide the 'Copy' button
 - ii. Display a new 'Phone Number' column in place of/instead of the 'Value' column:
 - 1. Display/populate the column as empty <BLANK> space initially
 - 2. Populate this field with the IVR Phone Number as static text, when/if the Capture Code is displayed**Note:** The Capture Code must be generated before dialing the number so that the IVR can verify it (see the Telephonic Signature Verification Lambda section, below)
 - d. When the 'Call Method' "Inbound From IVR" is selected, update the 'Value' column's label as 'Phone Number':
 - i. Display/populate the column as empty <BLANK> space initially. When/if the Capture Code is displayed, show the editable text field for the phone number that the IVR should call (same as the previously displayed 'Value' column) **Note:** The Capture Code must be generated before pressing the 'Call' button so that it can be sent to the IVR with the associated Electronic Signature details.
 - ii. Update the hover/tool-tip, for the 'Phone Number' input field(s), to "Enter Phone Number to be called"
 - iii. Hide the 'Copy' button**Note:** The 'Call' button is already displayed, before this update, and should continue to display except where this document mentions to hide it

5. Update the Person table for Electronic Signatures, when the 'Signature Method' "IVR/Text" is selected:
 - a. Update the 'Value' column as two separate columns:
 - i. 'Capture Code':
 1. When the 'Signature Capture Type' is "IVR":
 - a. This column will be blank until the signature request is saved
 - b. When the page is saved, populate this column with the code used to complete the electronic signature via the "IVR" Signature Capture Type
 2. When the 'Signature Capture Type' is "Text", this column will remain blank
 - ii. 'Phone Number':
 1. When the 'Signature Capture Type' is "Text":
 - a. Display the dropdown populated with phone numbers associated to the customer, according to existing logic **e.g.**, phone numbers that have been "opted-in" to receive text messages
 2. When the 'Signature Capture Type' is "IVR":
 - a. The column will remain blank until the page is saved
 - b. When the page is saved, populate this column with "1 855-702-1815" (the IVR phone number used to complete an electronic signature via the "IVR" Signature Capture Type)
6. Update the Audio and Transcript section(s): set the placeholder text to "Transcription Disabled".
7. Update the 'Signature History' section(s):
 - a. When "Telephonic" is selected for the 'Signature Method':
 - i. Remove the 'ext.' (extension) input field from the 'Value' Column
 - ii. Update the 'Value' column header as: 'Phone Number' and update the page logic to populate this column with the 'Phone Number' from the Person table as static text
 - iii. Populate this column with either the Telephonic Signature IVR 'Phone Number' (when the 'Call Method' is "Outbound to IVR") or the 'Phone Number' the called phone number (when the 'Call Method' is "Inbound from IVR"), leave this column blank for the 'Call Method' "eCCP"
 - b. When "IVR/Text" is selected for the 'Signature Method', update the 'Value' column as two separate columns: 'Capture Code'

and 'Phone Number' populated from the Person table see requirement # 5.

2.1.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping for updated fields.

2.1.7 Accessibility

1. The page has been assessed for accessibility opportunities and the following elements will be enhanced.
 - a. Non-unique IDs on page elements have a risk of hindering screen reader functionality. Update/correct the 'Call' buttons so that they have unique IDs.
 - b. Non-unique IDs on page elements have a risk of hindering screen reader functionality. Update the page so that there is only 1 element with ID = 'WzTtDiV'

Note: SCR CA-245360 is tracking an update to a list item not contained in a list element, in the validation message/callButtonWarning section of the page.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Electronic Signature Document Detail Page

2.2.1 Overview

The Electronic Signature Document Detail page allows users to view details about the Electronic Signature for a particular document, including the time/date of a Signature, the name(s) of the Person(s) who signed a document, and Signature History for the document.

Update the Audio and Transcript sections' placeholder text as 'Transcription Disabled'.

Update the Signature History Section(s) to show the 'Phone Number' associated with the Telephonic Signature Call or the IVR 'Phone Number' used for the "IVR/Text" 'Signature Method'.

2.2.2 Electronic Signature Document Detail Page Mockup

| Signature History - EBT 2259 | | | | |
|---|------------------------|----------------|----------|-----------------|
| Document Name: REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | | | | |
| Filkey, Darian 70M | | | | |
| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
| 02/29/2024 07:24:46 PM | Telephonic | 1-800-555-1234 | Received | 03/03/2024 |
| 02/29/2024 07:03:33 PM | Telephonic | 1-800-555-1234 | Not Sent | 03/03/2024 |
| FILKEY, LISANDRA 58F | | | | |
| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
| 02/29/2024 07:24:46 PM | Telephonic | 1-800-555-1234 | Received | 03/03/2024 |
| 02/29/2024 07:03:33 PM | Telephonic | 1-800-555-1234 | Not Sent | 03/03/2024 |

Figure 2.2.2.1 Signature History Section (Outbound to IVR Call Method was used)

Electronic Signature Document Detail

Save
Close

Document Name(s)
SAWS 1
SAWS 2 PLUS

Date Signed
Thursday, August 29, 2024 3:04:22:00 PM

Signatures

| ID | Name | eSign Name |
|-------------|-------------------|-------------------|
| IN-24748368 | Mouse, Minnie 53F | Mouse, Minnie 53F |

Audio and Transcript

Mouse, Minnie 53F

Transcription Disabled

⏮
⏭

Download Full Call
Download Signature

Edited (08/29/2024 3:04 PM, Daisy Duck, 90AS001900, Eligibility Specialist - Cambodian LC)

Incorrect Response

Signature History - SAWS 1

Document Name:
[Application for Cash Aid, CalFresh, and/or Medi-Cal/34-County CMSP \(SPA\)](#)

Mouse, Minnie 53F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|----------------|----------|-----------------|
| 08/22/2024 06:59:56 PM | Telephonic | 1-800-555-1234 | Received | 08/25/2024 |
| 08/22/2024 06:50:07 PM | Telephonic | 1-800-555-1234 | Not Sent | 08/25/2024 |

Signature History - SAWS 2 PLUS

Document Name:
[Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs \(SPA\)](#)

Mouse, Minnie 53F

| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
|------------------------|------------------------|----------------|----------|-----------------|
| 08/22/2024 06:59:56 PM | Telephonic | 1-800-555-1234 | Received | 08/25/2024 |
| 08/22/2024 06:50:07 PM | Telephonic | 1-800-555-1234 | Not Sent | 08/25/2024 |

Save
Close

Figure 2.2.2.1 – Electronic Signature Document Detail page

| Signature History - EBT 2259 | | | | |
|--|------------------------|----------------|----------|-----------------|
| Document Name: REPORT OF ELECTRONIC THEFT OF BENEFITS (ENG) | | | | |
| Filkey, Darian 70M | | | | |
| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
| 02/29/2024 07:24:46 PM | Telephonic | 1-800-555-1234 | Received | 03/03/2024 |
| 02/29/2024 07:03:33 PM | Telephonic | 1-800-555-1234 | Not Sent | 03/03/2024 |
| FILKEY, LISANDRA 58F | | | | |
| Date/Time | Signature Capture Type | Phone Number | Status | Expiration Date |
| 02/29/2024 07:24:46 PM | Telephonic | 1-800-555-1234 | Received | 03/03/2024 |
| 02/29/2024 07:03:33 PM | Telephonic | 1-800-555-1234 | Not Sent | 03/03/2024 |

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Formatted: Highlight

Formatted: Highlight

Figure 2.2.2.1 - Signature History Section (Outbound to IVR Call Method was used)

Formatted: Normal, Left

2.2.3 Description of Changes

1. ~~Update the Audio and Transcript section(s): Set the placeholder text to "Transcription Disabled".~~

Formatted: Strikethrough, Highlight

1. Update the 'Signature History' section(s):

a. When "Telephonic" is selected for the 'Signature Method':

i. Remove the 'ext.' (extension) input field from the 'Value' Column

ii. Update the 'Value' column header as: 'Phone Number' and update the page logic to populate this column with the 'Phone Number' from the Person table as static text

iii. Populate this column with either the Telephonic Signature IVR 'Phone Number' (when the 'Call Method' is "Outbound to IVR") or the 'Phone Number' the called phone number (when the "Call Method" is "Inbound from IVR"), leave this column blank for the 'Call Method' "eCCP"

2. ~~Update the Audio and Transcript section(s): Set the placeholder text to "Transcription Disabled".~~

Formatted: Strikethrough, Highlight

3. ~~Update the 'Signature History' section(s): the same as the Electronic Signature page see section 2.1 Electronic Signature Page requirement# 5.~~

Formatted

2. Update the 'Signature History' section(s): the same as the Electronic Signature page see section 2.1 Electronic Signature Page requirement# 5.

2.2.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update page mapping for updated fields.

2.2.7 Accessibility

1. The page has been assessed for accessibility opportunities and the following elements will be enhanced.
 - a. Non-unique IDs on page elements have a risk of hindering screen reader functionality.
 - i. Update/correct the 'Close' buttons so that they have unique IDs.
 - ii. Update/correct the 'Save' buttons so that they have unique IDs.
 - iii. Update/correct hidden fields (these do not show for the user) so that they have unique IDs (Tech Note: See element with ID = "firstCompletedIncorrectResponseButton" and the element with ID = 'WzTtDiv')

Note: SCR CA-245360 is tracking an update to a list item not contained in a list element, in the validation message/callButtonWarning section of the page.

2.2.8 Page Usage/Data Volume Impacts

N/A

Formatted: List Paragraph,TOC style,lp1,Bulleted Text,Bullet List,FooterText,List Paragraph1,Bulleted text,Bullet OSM,numbered,Paragraphe de liste1,Bulletr List Paragraph,列出段落,列出段落1,List Paragraph2,List Paragraph21,Párrafo de lista1,Parágrafo da Lista1,リスト段落1, Indent: Left: 2.25"

2.3 Telephonic Signature Verification Lambda

2.3.1 Overview

Create a new lambda to retrieve Electronic Signature details for a specific Capture Code.

2.3.2 Description of Change

1. Create a new Telephonic Signature Verification Lambda:
 - a. Trigger this lambda via the new **Inbound Welcome** Call Flow
 - b. Validate a provided Capture Code exists and is not in "Canceled" status or "Received" status
Note: The "Not Sent", "Sent", "Sending Error", and "Incorrect Response" statuses will be updated as needed, by existing functionality, at the end of the IVR interaction.
 - c. Retrieve the Telephonic Signature details including the participant/signers D.O.B. (Date of Birth), based on the Person associated to the provided Capture Code

2.3.3 Partner Integration Testing

N/A

2.3.4 Execution Frequency

On Demand

2.3.5 Key Scheduling Dependencies

N/A

2.3.6 Counties Impacted

All Counties

2.3.7 Category

On Demand

2.3.8 Data Volume/Performance

This interface will retrieve 1 record. No Performance Impact is expected.

2.3.9 Interface Partner

CalSAWS

2.3.10 Failure Procedure/Operational Instructions

There is no relevant failure procedure.

2.4 Telephonic Signature IVR

2.4.1 Overview

The Telephonic Signature IVR makes an outbound call to a provided number and guides the user thru the process of recording the audio that will be associated to a Telephonic Signature and will represent the participants signature on a document (or a collection of up to 25 documents).

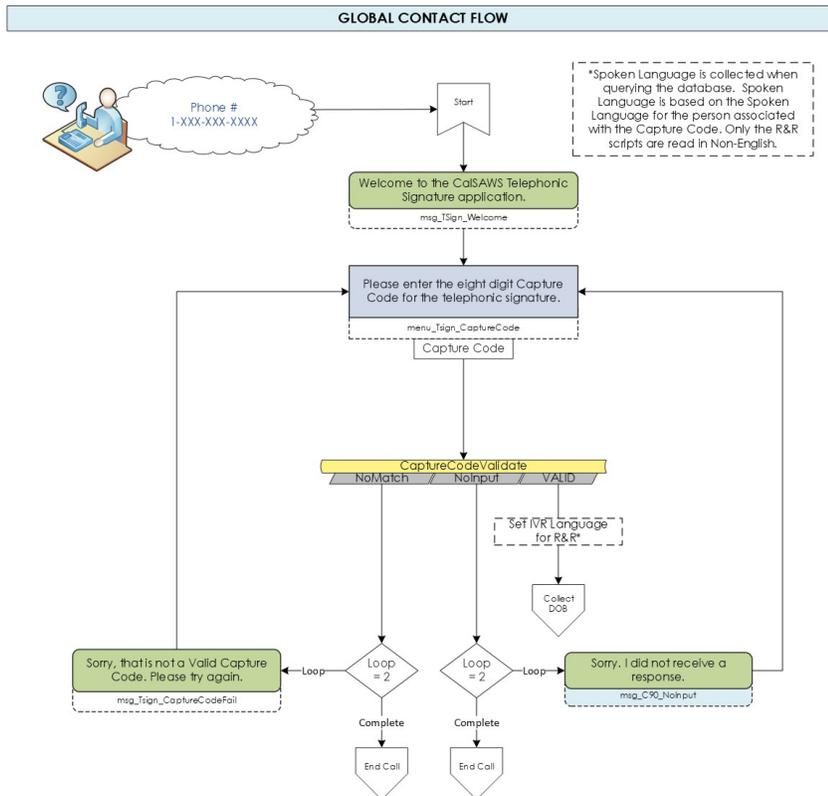
Add an **Inbound Welcome** Call Flow to:

- Accept a call and
- Validate a provided Capture Code and
- Transfer the call into the existing **Telephonic Signature – Collect D.O.B.** Call flow to record the signature audio

Update the **Telephonic Signature – Collect D.O.B.** Call flow to:

- Prompt the caller to press a key when ready to begin the Rights and Responsibilities script; this will allow time to conference a customer into the call
- Set the customer's expectations that the Rights and Responsibilities takes about 13 minutes instead of 3 minutes

2.4.2 New Call Flow Diagram



Global Flow | 0

Figure 2.4.2.1 - Inbound Welcome Call Flow

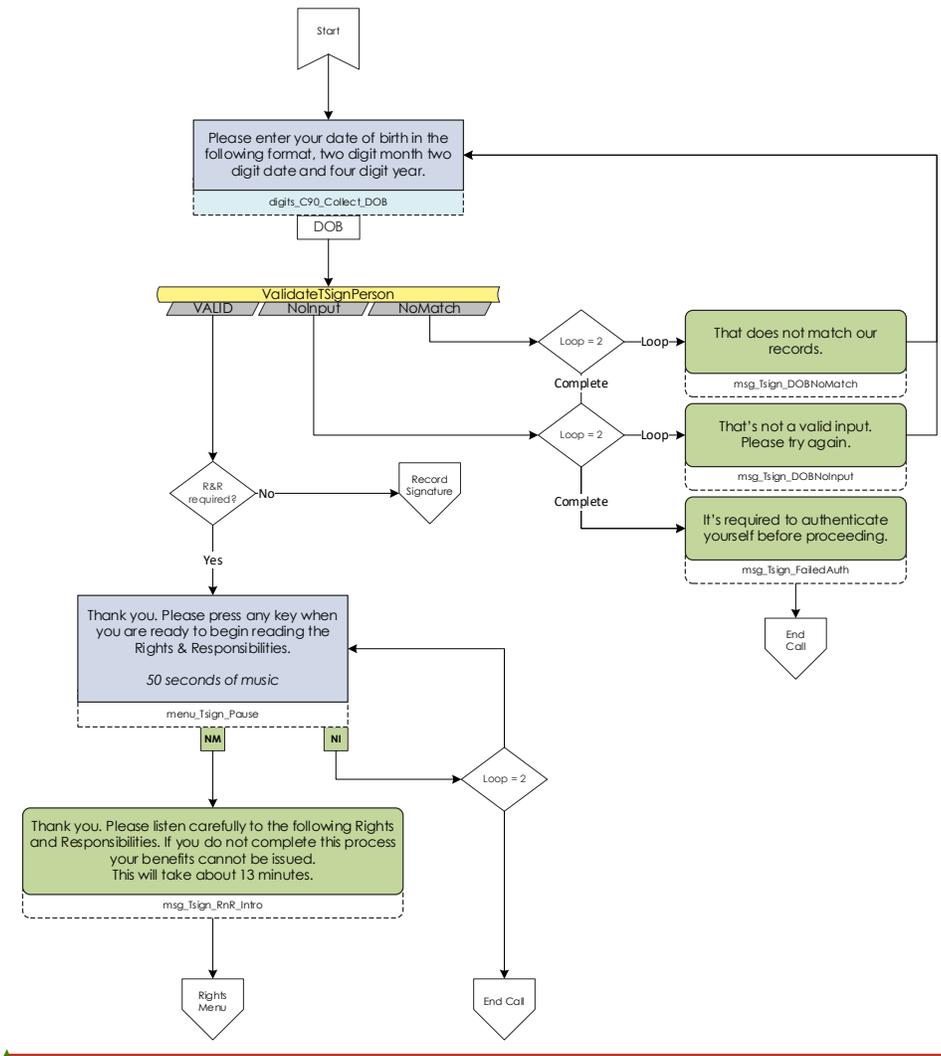


Figure 2.4.2.2 - Collect D.O.B. Call Flow

Field Code Changed

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2.4.3 Description of Changes

1. Add an **Inbound Welcome** Call Flow to:
 - a. Accept an incoming Telephonic Signature call and guide the caller to enter the Capture Code:
 - b. Validate a provided Capture Code exists and is not in "Canceled" status or "Received" status
Note: The "Not Sent", "Sent", "Sending Error", and "Incorrect Response" statuses will be updated as needed, by existing functionality, at the end of the IVR interaction.
 - b. Use the validated Capture Code to retrieve associated Electronic Signature details and associated Person/Case details, collected/filtered the same as done by the **TelephonicSignatureCallRequest** webservice:
 - a. Case Number
 - b. County Code
 - c. Language Code
 - d. Name
 - e. Capture Code
 - f. Document Number(s)
 - g. Date of Birth
 - h. Customer Number
 - i. Rights and Responsibilities Indicator/Option
 - c. Set the IVR Language
 - d. Transfer the call into the existing **Telephonic Signature – Collect D.O.B.** Call flow to complete the signature capture.
Note: the customer's preferred language is used for the Rights and Responsibilities and related prompts; it is not used for collecting the D.O.B. because we expect a Worker to enter it.

Note; Please see Section 3 supporting documents to review the multiple call flows in detailed.

Note; Detail call flow please refer to supporting documentation (the whole visio flow).

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2.4.4 Page Location

N/A

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Accessibility

N/A

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Automated Regression Test

2.5.1 Overview

Create automated regression test scripts to verify the display and available values of the 'Call Method' dropdown on the Electronic Signature page, and a subset of the dynamic display changes triggered by selecting each of the following values: 'eCCP', 'Outbound To IVR', 'Inbound From IVR'.

Create automated regression test scripts to verify a subset of the dynamic display changes on the Electronic Signature page for Signature Method 'IVR/Text'.

2.5.2 Description of Change

Create regression scripts to verify each of the following scenarios related to the Electronic Signature page in create mode:

1. Select Signature Method 'Telephonic'. Verify that the Call Method dropdown displays with the following selectable options:
 - a. eCCP
 - b. Inbound From IVR
 - c. Outbound To IVR
2. Select Signature Method 'Telephonic' and Call Method 'eCCP'. Verify the following message displays after the 'Associated Documents' section and before the table in the 'Rights and Responsibilities' section: "Please use a Quick Connect to read an R&R script."
3. Select Signature Method 'Telephonic' and Call Method 'Outbound To IVR'. Verify the 'Phone Number' column displays in the 'Rights and Responsibilities' section.
4. Select Signature Method 'Telephonic' and Call Method 'Inbound From IVR'. Verify the 'Phone Number' column displays in the 'Rights and Responsibilities' section.
5. Select Signature Method 'IVR/Text'. Verify the 'Capture Code' and 'Phone Number' columns display in the 'Rights and Responsibilities' section.

3 SUPPORTING DOCUMENTS

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| Number | Functional Area | Description | Attachment |
|--------|-----------------|-------------------------|---|
| 1. | IVR Flow | Detail IVR Flow (Visio) | CA-260329 - Outbound Call Telephonic Signature.vsdX |
| 2. | IVR Flow | Detail IVR Flow (PDF) | CA-260329 - Outbound Call Telephonic Signature.pdf |

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34 REQUIREMENTS

3.14.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|--------------------------|---|--|
| 3.5.1.12 DDID 2211 | 12. The LRS shall be able to capture, store, and display electronic signatures and signature dates. The CONTRACTOR shall configure the Telephonic Signature solution to allow designated County staff to update a transcript of attestations and fill out metadata fields while they are recording the telephonic signature of a customer. The solution will analyze the transcript for quality standards and generate a task for recordings that do not meet quality standards with a link to the telephonic signature recording. | Adds additional capture abilities to the system. Options chosen on the Electronic Signature page will be saved and associated to the Telephonic Signature as metadata. |
| DDID 2217 | The CONTRACTOR shall configure the Telephonic Signature solution to interface with the CalSAWS Software to retrieve relevant case and customer data to associate with the digital signature file as metadata in the recording repository. | The IVR application will retrieve and edit the related customer data in the CalSAWS database associating the Telephonic Signature audio to the Capture Code |

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3.2— Migration Requirements

N/A

4 Migration Impacts

N/A

5 Appendix

[Include any supplementary items that may not fit in the Description section. Examples could include flow charts, lengthy code tables, etc....]

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CalSAWS

California Statewide Automated Welfare System

Design Document

CA-265742

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

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

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

The purpose of this design is to update the existing "On Aid Another Case" NOA to also generate for "Gets Duplicate Aid" reason in English and available threshold languages..

1.1 Current Design

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

1.2 Requests

1. Update existing Denial NOA – 'On Aid Another Case' to also generate for 'Gets Duplicate Aid' reason for both program and person level.
Languages include: English, Spanish, Armenian, Arabic, Chinese, Cambodian, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.3 Overview of Recommendations

1. Update existing Denial NOA – 'On Aid Another Case' to also generate for 'Gets Duplicate Aid' reason for both program and person level.
Languages include: English, Spanish, Armenian, Arabic, Chinese, Cambodian, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

1.4 Assumptions

1. The NOA template remains the same and is not being updated.
2. The existing variable population is not being updated with this effort.
3. This existing verbiage is not being updated with this effort.
4. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

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

2.1.1 Overview

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

State Form/NOA: NA 290

NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Programs: CalWORKs

Action Type: Denial

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

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

2.1.2 NOA Verbiage

This effort will not be updating the NOA reason verbiage.

Existing NOA verbiage (Snippet ID 7643):

"All Household members are aided on another case."

2.1.3 NOA Variable Population

This effort will not be updating the NOA variable population.

Action Fragment:

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

Here's why:"

2.1.4 NOA Generation Conditions

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

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

1. The EDBC program is CalWORKs.
2. The program is denied in the currently run EDBC.
3. All program persons on the program are failing for the reason of 'Gets Duplicate Aid' Status reason (CT73_GD).
4. There is not an existing EDBC for the program for the current or prior Benefit month

or

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

or

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

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

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

NOA Title and Footer Reference for new Reason Fragment

NOA Reference on Document List Page: On Aid Another Case

NOA Title: NOTICE OF ACTION – CALWOKS DENIAL

NOA Title Requires Translations: No

NOA Footer: NA 290

NOA Footer Requires Translation: No

Reason Fragment Regulation

REGULATIONS : 40-103.41 and 40-105.3

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

2.2.1 Overview

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

State Form/NOA: NA 290

NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Programs: CalWORKs

Action Type: Denial

Repeatable: No

Include NA Back 9: Yes

Forms/NOAs Generated with this NOA: N/A

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

2.2.2 NOA Verbiage

This effort will not be updating the NOA reason verbiage.

Existing NOA verbiage (Snippet ID 7640):

"<Person>

already gets <ProgramType> on another case."

2.2.3 NOA Variable Population

This effort will not be updating the NOA variable population.

Action Fragment:

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

Here's why:"

2.2.4 NOA Generation Conditions

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

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

1. The EDBC program is CalWORKs.
2. The person is denied in the currently run EDBC.
3. The person is failing for the reason of 'Gets Duplicate Aid' Status reason (CT73_GD).
4. All program persons on the program are not failing for the reason of 'Gets Duplicate Aid' Status reason (CT73_GD).
5. There is not an existing EDBC for the program for the current or prior Benefit month

or

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

or

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

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

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

NOA Title and Footer Reference for new Reason Fragment

NOA Reference on Document List Page: On Aid Another Case

NOA Title: NOTICE OF ACTION – CALWOKS DENIAL

NOA Title Requires Translations: No

NOA Footer: NA 290

NOA Footer Requires Translation: No

Reason Fragment Regulation

REGULATIONS : 40-103.41 and 40-105.3

TECHNICAL NOTE: Currently, system has three NOA's for "On Aid Another Case" reason for CalFresh, CalWORKs and Immediate Need programs. As part of this effort, we are adding new NOA entries for "Gets Duplicate Aid" Reason for CalWORKs program in CT_662.

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|---------------------------------------|---|
| 1 | NOA | NA290_GetsDuplicateAid English Mockup | NA290_GetsDuplicateAid_EN Mockup.pdf NA290_GetsDuplicateAidPersonLevel_EN Mockup.pdf |

4 REQUIREMENTS

4.1 Project Requirements

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-267005

Add GAGR In-Kind Chart for Requesting
Counties

| | | |
|----------------|----------------------------------|-----------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Tom Lazio |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|------------|------------------|---|-----------|
| 03/25/2024 | 1.0 | Initial Draft | Tom Lazio |
| 05/09/2024 | 2.0 | Added updates for Sacramento County In-kind chart amounts | Tom Lazio |
| 05/10/2024 | 3.0 | Added assumption #6 and added In-kind chart amounts for AU sizes 3 or more in Section 2.1.2.8 for Sacramento County. | Tom Lazio |
| 05/14/2024 | 4.0 | <ul style="list-style-type: none"> • Removed Ventura County In-kind chart amounts as In-Kind Income is 'Exempt'. • Added 2 CTCR entries for Solano County for In Kind Income amounts ending 06/30/2024 and In Kind Income amounts effective 07/01/2024. | Tom Lazio |
| 10/09/2024 | 5.0 | <p>Content Revision:</p> <ul style="list-style-type: none"> - Update GR EDBC In Kind Income Budget Creation logic to no longer exclude San Mateo county. | Tom Lazio |
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1 OVERVIEW

Add In-kind income chart values used in the GA/GR Automated Solution program for Fresno, San Mateo, Solano, Tulare, and Yolo counties. Also, update existing In-kind income chart values for Sacramento County.

1.1 Current Design

There are no In-kind chart amounts (CT10688) for the requesting counties below. Per current functionality, the in-kind amount is set to the lesser of the in-kind chart amount (CT10688) and the amount entered by the user. As the current chart amounts do not exist for these counties, the in-kind amount will always be zero.

- Fresno
- San Mateo
- Solano
- Tulare
- Yolo

Additionally, specific individual In-kind chart amounts are incorrect for Sacramento County.

1.2 Requests

1. Add In-Kind chart amounts for Fresno, San Mateo, Solano, Tulare, and Yolo counties.
2. Update existing individual In-Kind chart amounts and add new individual In-Kind chart amounts for Sacramento County.
3. Update GR EDBC In Kind Income Budget Creation logic to no longer exclude San Mateo County.

1.3 Overview of Recommendations

1. Code Table Change Request (CTCR) to add In-Kind income chart amounts for Fresno, San Mateo, Solano, Tulare, and Yolo counties.
2. Code Table Change Request (CTCR) to update existing individual In-Kind income chart amounts and add new individual In-Kind chart amounts for Sacramento County.
3. GR EDBC In Kind Income Budget Creation logic change to no longer exclude San Mateo County.

1.4 Assumptions

1. Clothing (Unearned and Earned) Amounts in the CalSAWS In-Kind Income chart represent the 'Personal Needs' In-Kind Amount for Solano County and 'Other' In-Kind Amount (Individual) for Tulare County.
2. Contra Costa In-Kind income chart amounts, Tulare In-Kind income chart amounts (for couples) and Sacramento 'Shares With' values functionality will be addressed in future SCR CA-275594.
3. After the implementation of this SCR, In-Kind amounts will be deducted from the GA/GR Automated Solution benefit amounts. Requesting counties in this SCR with cases with In-Kind incomes will see changes to the benefits going forward on those cases.
4. No additional Admin rules will be added with this SCR for In-Kind income.
5. There are no different amounts based on 'Earned' or 'Unearned' per household size for Sacramento County.
6. The individual In-Kind amounts for 'Housing-Earned' (all AU sizes) and 'Food – Unearned' (all AU sizes) are correct for Sacramento County.

2 RECOMMENDATIONS

2.1 Eligibility: Add In-Kind Income Chart for Requesting Counties

2.1.1 Overview

Apply a CTCR to insert new GA/GR In-Kind Income Amounts effective as of minimum date to high date (Code Table 10688) for the following counties:

- Fresno
- San Mateo
- Solano
- Tulare
- Yolo

Apply CTCR to update end date existing individual GA/GR In-Kind Income Amounts (Code Table 10688) and add new individual GA/GR In-Kind Income Amounts with the correct amounts for Sacramento County.

2.1.2 Description of Changes

1. Add the following high-dated In-Kind Income records for Fresno County:

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 1 | 97 | R1 | 124 |
| 10688 | Housing- Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 1 | 96 | R1 | 124 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 1 | 37 | R1 | 25 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 1 | 36 | R1 | 25 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 2 | 97 | R1 | 163 |
| 10688 | Housing- Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 2 | 96 | R1 | 163 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 2 | 37 | R1 | 28 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 2 | 36 | R1 | 28 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 3 | 97 | R1 | 181 |
| 10688 | Housing- Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 3 | 96 | R1 | 181 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 3 | 37 | R1 | 34 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 3 | 36 | R1 | 34 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 4 | 97 | R1 | 185 |
| 10688 | Housing- Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 4 | 96 | R1 | 185 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 4 | 37 | R1 | 35 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 4 | 36 | R1 | 35 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 5 | 97 | R1 | 187 |
| 10688 | Housing- Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 5 | 96 | R1 | 187 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 5 | 37 | R1 | 35 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 5 | 36 | R1 | 35 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 6 | 97 | R1 | 188 |
| 10688 | Housing- Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 6 | 96 | R1 | 188 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 6 | 37 | R1 | 35 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 6 | 36 | R1 | 35 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 7 | 97 | R1 | 190 |
| 10688 | Housing– Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 7 | 96 | R1 | 190 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 7 | 37 | R1 | 35 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 7 | 36 | R1 | 35 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 8 | 97 | R1 | 207 |
| 10688 | Housing– Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 8 | 96 | R1 | 207 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 8 | 37 | R1 | 35 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 8 | 36 | R1 | 35 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 9 | 97 | R1 | 214 |
| 10688 | Housing– Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 9 | 96 | R1 | 214 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 9 | 37 | R1 | 35 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 9 | 36 | R1 | 35 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 10 | 97 | R1 | 231 |
| 10688 | Housing– Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 10 | 96 | R1 | 231 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 10 | 10 | 37 | R1 | 35 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 10 | 10 | 36 | R1 | 35 |

2. Add the following high-dated In-Kind Income records for San Mateo County:

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|--------------------|--------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 93 | R1 | 214 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 92 | R1 | 214 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 97 | R1 | 391 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 96 | R1 | 391 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 37 | R1 | 82 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 36 | R1 | 82 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 95 | R1 | 65 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 1 | 94 | R1 | 65 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 93 | R1 | 457 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 92 | R1 | 457 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 97 | R1 | 519 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 96 | R1 | 519 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 37 | R1 | 95 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 36 | R1 | 95 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 95 | R1 | 127 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 2 | 94 | R1 | 127 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 93 | R1 | 568 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 92 | R1 | 568 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 97 | R1 | 568 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 96 | R1 | 568 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 37 | R1 | 98 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 36 | R1 | 98 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 95 | R1 | 189 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 3 | 94 | R1 | 189 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 93 | R1 | 724 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 92 | R1 | 724 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 97 | R1 | 598 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 96 | R1 | 598 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 37 | R1 | 103 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 95 | R1 | 252 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 4 | 94 | R1 | 252 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 93 | R1 | 878 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 92 | R1 | 878 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 97 | R1 | 598 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 96 | R1 | 598 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 37 | R1 | 103 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 95 | R1 | 321 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 5 | 94 | R1 | 321 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 93 | R1 | 1015 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 92 | R1 | 1015 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 97 | R1 | 598 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 96 | R1 | 598 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 37 | R1 | 103 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 95 | R1 | 384 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 6 | 94 | R1 | 384 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 93 | R1 | 1132 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 92 | R1 | 1132 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 97 | R1 | 598 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 96 | R1 | 598 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 37 | R1 | 103 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 95 | R1 | 449 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 7 | 94 | R1 | 449 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 93 | R1 | 1235 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 92 | R1 | 1235 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 97 | R1 | 598 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 96 | R1 | 598 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 37 | R1 | 103 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 95 | R1 | 498 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 8 | 94 | R1 | 498 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 93 | R1 | 1359 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 92 | R1 | 1359 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 97 | R1 | 598 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 96 | R1 | 598 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 37 | R1 | 103 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 95 | R1 | 573 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 9 | 94 | R1 | 573 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 93 | R1 | 1470 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 92 | R1 | 1470 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 97 | R1 | 598 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 96 | R1 | 598 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 37 | R1 | 103 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 36 | R1 | 103 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 95 | R1 | 628 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 41 | 10 | 94 | R1 | 628 |

3. Add the following In-Kind Income records for Solano County with the End Date set to **06/30/2024**:

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 93 | R1 | 209 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 92 | R1 | 209 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 97 | R1 | 383 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 96 | R1 | 383 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 37 | R1 | 79 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 36 | R1 | 79 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 95 | R1 | 62 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 1 | 94 | R1 | 62 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 93 | R1 | 448 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 92 | R1 | 448 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 97 | R1 | 510 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 96 | R1 | 510 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 37 | R1 | 91 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 36 | R1 | 91 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 95 | R1 | 125 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 2 | 94 | R1 | 125 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 93 | R1 | 575 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 92 | R1 | 575 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 97 | R1 | 558 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 96 | R1 | 558 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 37 | R1 | 95 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 36 | R1 | 95 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 95 | R1 | 185 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 3 | 94 | R1 | 185 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 93 | R1 | 712 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 92 | R1 | 712 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 97 | R1 | 587 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 96 | R1 | 587 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 37 | R1 | 99 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 95 | R1 | 246 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 4 | 94 | R1 | 246 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 93 | R1 | 864 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 92 | R1 | 864 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 97 | R1 | 587 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 96 | R1 | 587 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 37 | R1 | 99 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 95 | R1 | 313 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 5 | 94 | R1 | 313 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 93 | R1 | 999 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 92 | R1 | 999 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 97 | R1 | 587 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 96 | R1 | 587 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 37 | R1 | 99 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 95 | R1 | 376 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 6 | 94 | R1 | 376 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 93 | R1 | 1112 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 92 | R1 | 1112 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 97 | R1 | 587 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 96 | R1 | 587 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 37 | R1 | 99 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 95 | R1 | 440 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 7 | 94 | R1 | 440 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 93 | R1 | 1215 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 92 | R1 | 1215 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 97 | R1 | 587 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 96 | R1 | 587 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 37 | R1 | 99 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 95 | R1 | 489 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 8 | 94 | R1 | 489 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 93 | R1 | 1335 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 92 | R1 | 1335 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 97 | R1 | 587 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 96 | R1 | 587 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 37 | R1 | 99 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 95 | R1 | 562 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 9 | 94 | R1 | 562 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 93 | R1 | 1445 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 92 | R1 | 1445 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 97 | R1 | 587 |
| 10688 | Housing – Unearned | Housing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 96 | R1 | 587 |
| 10688 | Utilities – Earned | Utilities - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 37 | R1 | 99 |
| 10688 | Utilities – Unearned | Utilities - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 36 | R1 | 99 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 95 | R1 | 612 |
| 10688 | Clothing – Unearned | Clothing - Unearned | 0 | 01/01/1000 | 06/30/2024 | 48 | 10 | 94 | R1 | 612 |

4. Add the following In-Kind Income records for Solano County effective as of **07/01/2024**:

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|-------------------|------------------|-------------|-------------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 93 | R1 | 217 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 92 | R1 | 217 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 97 | R1 | 398 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 96 | R1 | 398 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 37 | R1 | 82 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 36 | R1 | 82 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 95 | R1 | 64 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 1 | 94 | R1 | 64 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 93 | R1 | 465 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 92 | R1 | 465 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 97 | R1 | 530 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 96 | R1 | 530 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 37 | R1 | 94 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 36 | R1 | 94 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 95 | R1 | 130 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 2 | 94 | R1 | 130 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 93 | R1 | 598 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 92 | R1 | 598 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 97 | R1 | 580 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 96 | R1 | 580 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 37 | R1 | 98 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 36 | R1 | 98 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 95 | R1 | 192 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 3 | 94 | R1 | 192 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 93 | R1 | 740 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 92 | R1 | 740 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 36 | R1 | 102 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 95 | R1 | 255 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 4 | 94 | R1 | 255 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 93 | R1 | 898 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 92 | R1 | 898 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 36 | R1 | 102 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 95 | R1 | 325 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 5 | 94 | R1 | 325 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 93 | R1 | 1038 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 92 | R1 | 1038 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 36 | R1 | 102 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 95 | R1 | 391 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 6 | 94 | R1 | 391 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 93 | R1 | 1156 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 92 | R1 | 1156 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 36 | R1 | 102 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 95 | R1 | 457 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 7 | 94 | R1 | 457 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 93 | R1 | 1263 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 92 | R1 | 1263 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 36 | R1 | 102 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 95 | R1 | 508 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 8 | 94 | R1 | 508 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 93 | R1 | 1388 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 92 | R1 | 1388 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 36 | R1 | 102 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 95 | R1 | 584 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 9 | 94 | R1 | 584 |
| 10688 | Food - Earned | Food - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 93 | R1 | 1502 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 92 | R1 | 1502 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 97 | R1 | 610 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 96 | R1 | 610 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 37 | R1 | 102 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 36 | R1 | 102 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 95 | R1 | 636 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 07/01/2024 | 12/31/9999 | 48 | 10 | 94 | R1 | 636 |

5. Add the following high-dated In-Kind Income records for Tulare County:

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|---------------------|---------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 1 | 93 | R1 | 63 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 1 | 92 | R1 | 63 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 1 | 97 | R1 | 159 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 1 | 96 | R1 | 159 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 1 | 95 | R1 | 40 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 1 | 94 | R1 | 40 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 2 | 93 | R1 | 47 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 2 | 92 | R1 | 47 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 2 | 97 | R1 | 135 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 2 | 96 | R1 | 135 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 2 | 95 | R1 | 40 |

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|---------------------|---------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 2 | 94 | R1 | 40 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 3 | 93 | R1 | 42 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 3 | 92 | R1 | 42 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 3 | 97 | R1 | 127 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 3 | 96 | R1 | 127 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 3 | 95 | R1 | 40 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 3 | 94 | R1 | 40 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 4 | 93 | R1 | 37 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 4 | 92 | R1 | 37 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 4 | 97 | R1 | 119 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 4 | 96 | R1 | 119 |
| 10688 | Clothing - Earned | Clothing - Earned | 0 | 01/01/1000 | 12/31/9999 | 54 | 4 | 95 | R1 | 40 |
| 10688 | Clothing - Unearned | Clothing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 54 | 4 | 94 | R1 | 40 |

6. Add the following high-dated In-Kind Income records for Yolo County:

| CATGRY ID | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|----------------------|----------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 57 | 1 | 93 | R1 | 100 |
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 57 | 1 | 92 | R1 | 100 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 57 | 1 | 97 | R1 | 200 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 57 | 1 | 96 | R1 | 200 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 57 | 1 | 37 | R1 | 28 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 57 | 1 | 36 | R1 | 28 |
| 10688 | Food - Earned | Food - Earned | 0 | 01/01/1000 | 12/31/9999 | 57 | 2 | 93 | R1 | 200 |

| | | | | | | | | | | |
|-------|----------------------|----------------------|---|------------|------------|----|---|----|----|-----|
| 10688 | Food - Unearned | Food - Unearned | 0 | 01/01/1000 | 12/31/9999 | 57 | 2 | 92 | R1 | 200 |
| 10688 | Housing - Earned | Housing - Earned | 0 | 01/01/1000 | 12/31/9999 | 57 | 2 | 97 | R1 | 300 |
| 10688 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 57 | 2 | 96 | R1 | 300 |
| 10688 | Utilities - Earned | Utilities - Earned | 0 | 01/01/1000 | 12/31/9999 | 57 | 2 | 37 | R1 | 56 |
| 10688 | Utilities - Unearned | Utilities - Unearned | 0 | 01/01/1000 | 12/31/9999 | 57 | 2 | 36 | R1 | 56 |

7. Set the End Date to **08/31/2023** on the following existing individual In-Kind Income records for Sacramento County:

| CATGRY ID | Code_Num_Identif | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|------------------|--------------------|--------------------|-------------|------------|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | CF | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 34 | 1 | 96 | R2 | 118 |
| 10688 | CG | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 34 | 1 | 96 | R2 | 111 |
| 10688 | CH | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 34 | 1 | 96 | R2 | 125 |
| 10688 | L3 | Housing - Unearned | Housing - Unearned | 0 | 01/01/1000 | 12/31/9999 | 34 | 2 | 96 | R2 | 118 |

8. Add the following new individual In-Kind records for Sacramento County effective as of **09/01/2023**:

| CATGRY ID | Code_Num_Identif | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|------------------|--------------------|--------------------|-------------|-------------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | CH | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 1 | 96 | R2 | 148 |
| 10688 | L3 | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 2 | 96 | R2 | 159 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 3 | 96 | R2 | 175 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 4 | 96 | R2 | 186 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 5 | 96 | R2 | 186 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 6 | 96 | R2 | 186 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 7 | 96 | R2 | 186 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 8 | 96 | R2 | 186 |
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 9 | 96 | R2 | 186 |

| CATGRY ID | Code_Num_Identif | SHORT DECODE NAME | LONG DECODE NAME | ORDR BY NUM | BEG DATE | END DATE | REFER TABLE_1 DESCR | REFER TABLE_2 DESCR | REFER TABLE_3 DESCR | REFER TABLE_4 DESCR | REFER TABLE_5 DESCR |
|-----------|------------------|--------------------|--------------------|-------------|------------|------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| 10688 | TBD* | Housing - Unearned | Housing - Unearned | 0 | 09/01/2023 | 12/31/9999 | 34 | 10 | 96 | R2 | 186 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 1 | 93 | R2 | 68 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 2 | 93 | R2 | 119 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 3 | 93 | R2 | 154 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 4 | 93 | R2 | 191 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 5 | 93 | R2 | 238 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 6 | 93 | R2 | 281 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 7 | 93 | R2 | 320 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 8 | 93 | R2 | 358 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 9 | 93 | R2 | 389 |
| 10688 | TBD* | Food - Earned | Food - Earned | 0 | 09/01/2023 | 12/31/9999 | 34 | 10 | 93 | R2 | 420 |

TBD* - Code_Num_Identif to be determined in development as these will be new codes.

Code Table 10688 Reference Table Columns:

- REFER_TABLE_1_DESCR = County Code
- REFER_TABLE_2_DESCR = Household Size
- REFER_TABLE_3_DESCR = Income Type (values in Short/Long Decode Name columns from CT 186)
 - 36 - Utilities - Unearned
 - 37 - Utilities - Earned
 - 92 - Food - Unearned
 - 93 - Food - Earned
 - 94 - Clothing - Unearned
 - 95 - Clothing - Earned
 - 96 - Housing - Unearned
 - 97 - Housing - Earned
- REFER_TABLE_4_DESCR = Region
- REFER_TABLE_5_DESCR = In-kind Chart Amount
*(There are other reference columns in this table, but they are null/not used by any of the above counties:
6-Other, 7-Stabilization, 8-SSIP/CALM/PAES/AGEX, 9-GA/GR)*

2.1.3 Programs Impacted

GA/GR Automated Solution

2.2 Eligibility: Update GR EDBC In Kind Income Budget Creation logic

2.2.1 Overview

Update EDBC rule that creates the in-kind budget items for the GA/GR Automated Solution program to no longer exclude evaluating in-kind incomes for San Mateo County.

2.2.2 Description of Changes

1. Remove the logic that excludes counting In-kind income for San Mateo County.

2.2.3 Programs Impacted

GA/GR Automated Solution

Technical Note: See CA-267005 In Kind Income Flow Chart Visio (Inkind Income tab) attachment in Appendix Section below.

3 REQUIREMENTS

3.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|------------------------|---|---|
| 2.16.1.1 (CAR-1163) | The LRS shall be capable of handling several types of mass updates, including table changes and regulatory changes. | Add and update In-Kind Income charts for counties listed in this SCR. |

4 APPENDIX



CA-267005 In Kind
Income Flow Chart.vsx

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-271707

Enhance Pickup Location to Be Available for
Multiple Payees Under a Program

| | | |
|----------------|----------------------------------|---------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Eric Wu |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-----------|------------------|--|---------|
| 1/9/2024 | 1.0 | Initial Draft | Eric Wu |
| 3/21/2024 | 1.1 | Updates based on SFO inputs. <ol style="list-style-type: none"> 1. Rename 'Daily Issuance Location' field to 'Supplemental Issuance Location'. 2. List all programs can set up a Pickup Location in Appendix 3. Change 2.5 Skip Issuance Logic to also consider Deliver Method. | Eric Wu |
| 4/3/2024 | 1.2 | Update 2.2 <ol style="list-style-type: none"> 1. Make Monthly Benefits Location not mandatory. 2. Add validation when both locations are blank. 3. Add a mockup of 'Select A Resource' page. Update 2.5 Use more descriptive Skip Issuance Reason | Eric Wu |
| 4/14/2024 | 1.3 | Update 2.6 based on SFO inputs | Eric Wu |
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1 OVERVIEW

1.1 Current Design

San Francisco County requires a Pickup Location in their warrant issuance process. The field provides additional instructions to sort and print warrants for clients especially those with unstable housing situations.

SCR CA-236812 introduce a Pickup Location field in Issuance Method Detail page. It allows users to assign the location for the designated payee of the program. In addition, the system also defaults the location of Welfare to Work Routine Warrants to '170 Otis' since the Issuance Method Detail page is not available for the program.

1.2 Requests

County would like to be able to assign a Pickup Location in below scenarios:

1. Warrants are issued to an entity other than payee of the program such as vendors of Money Management.
2. Warrants are issued under Welfare to Work, Child Care, GA/GR Employment Services and CFET where Issuance Method Detail page is not available.
3. Different Pickup Locations between monthly benefits and supplemental payments for one payee.

1.3 Overview of Recommendations

1. Add a new Pickup Location List page that will allow users to manage pickup locations under a program.
2. Remove Pickup Location field on Issuance Detail page.
3. Update CalWIN Warrant Print Writer to generate the Pickup Location based on the Pickup Location List page.
4. For San Francisco County only, update Issuance Batch to skip a warrant issuance when the Pickup Location is blank and the deliver method is Pickup or when the Pickup Location is specified and deliver method is Mail.
5. Perform one-time DCR to migrate existing Pickup Locations from Issuance Method Detail to the new Pickup Location List.

1.4 Assumptions

1. The new page allows users to set up pickup location based on Issuance Categories. The field 'Monthly Benefits Location' is designated for Monthly Benefits, and the 'Supplemental Issuance Location' is for 'Collections Refund', 'Supplemental Benefit', 'Service Payment', and 'Customer Non-Benefit'.
2. Based on the SFO request, the SCR will migrate the existing pickup locations of Issuance Detail page to the new 'Supplemental Issuance Location', but not 'Monthly Benefits Location', for the following main payroll programs – Homeless Perm, Homeless Temp, CalWORKs, Immediate Need, and RCA. Any monthly

benefits of these programs with Pickup as delivery method will be skipped during the upcoming main payroll run after the implementation of the SCR.

3. New Pickup Location functionalities do not apply to Rush Warrant and Auxiliary Payments. SFO has submitted CER 'CA-275777 Add Delivery Method option on the Auxiliary Authorization page.

2 RECOMMENDATIONS

2.1 Warrant Pickup Location List

2.1.1 Overview

This page will allow users to view, add and remove Pickup Locations for all payees under a case.

2.1.2 Warrant Pickup Location List Mockup

Warrant Pickup Location List

*- Indicates required fields Close

Program:

Results per Page: View

Add

Search Results Summary Results 1 - 1 of 1

| <input type="checkbox"/> | Program | Payee Type | Payee | Supplemental Issuance Location | Monthly Benefits Location | |
|--------------------------|----------|------------|---------------|--------------------------------|---------------------------|--|
| <input type="checkbox"/> | CalWORKs | Person | Doe, John 60M | Location 01 | Location 02 | Edit View History |

Remove Add
Close

Figure 2.1.1 – Warrant Pickup Location List page

Search Results Summary Results 1 - 1 of 1

| <input type="checkbox"/> | Program | Payee Type | Payee | Supplemental Issuance Location | Monthly Benefits Location | |
|--------------------------|-----------------|------------|---------------|--------------------------------|---------------------------|--|
| <input type="checkbox"/> | Welfare to Work | Person | Doe, John 60M | Location 01 | N/A | Edit View History |

Figure 2.1.2 – Warrant Pickup Location List page – Non main payroll program

The screenshot shows a web interface titled "Transaction History Detail". At the top, there are three filter fields: "Begin Date:" with a calendar icon and the value "12/23/2023", "End Date:" with a calendar icon and the value "01/23/2024", and "Staff ID:" with a "Select" button. A "Search" button is located to the right. Below the filters is a table with a dark blue header containing the following columns: "Transaction Record / Field", "Old Value", "New Value", "Date Time Stamp", "Staff ID", "Change Reason", and "Report Date". Underneath the header, there is a section titled "Pickup Location Detail" which is currently collapsed. At the bottom of the page, a status bar indicates "This Type_1 page took 3.16 seconds to load."

Figure 2.1.1 – Transaction History Detail – Pickup Location Detail

2.1.3 Description of Changes

1. Create a new Warrant Pickup Location List page that will be visible to users with the 'WarrantPickupLocationListView' security right.
2. Users will be able to navigate to this page from "Warrant Pickup Location List" on the left-hand sidebar under the Case Summary context. The link will be available below "Auxiliary Authorization List".
3. The top section of the page includes the following:
 - a. Program:
 - i. This is a drop-down field to filter the results in this page based on the program.
 - ii. The field will be blank as default value.
 - iii. The field will have all cash programs associated to the case. Please refer to Appendix 1 for the list of cash programs available.
 - b. Results per Page:
 - i. This field indicates the number of records to be displayed per page. The selectable options are 25, 50, 75, and 100. The default value is 25.
 - c. View button:
 - i. This button will filter the results in this page based on values of above fields.
4. The following section of the page includes the following:
 - a. Check Box:
 - i. This checkbox is visible to users with 'WarrantPickupLocationDetailEdit' security rights and allows them to remove a record.
 - b. Program:
 - i. This indicates the program of the Warrant Pickup Location.
 - ii. Please see Appendix 1 for the list of programs available.
 - c. Payee Type:
 - i. Possible value are 'Person' and 'Resource'.
 - d. Payee:

- i. This indicates the payee whom the Warrant Pickup Location sat up for.
 - e. Supplemental Issuance Location:
 - i. This field indicates the location where all **non**-Monthly Benefits warrants should be assigned.
 - ii. Possible values are from Category Pickup Location (ID 112421) and are county specific.
 - f. Monthly Benefits Location:
 - i. This field indicates the location where all Monthly Benefits warrants should be assigned for a main payroll program. Please see the list of main payroll programs in [Appendix](#).
 - ii. For a non-main payroll program, it will display 'N/A.' Please see Figure 2.1.2.
 - g. Edit Button:
 - i. This button will navigate users to Warrant Pickup Location Detail in edit mode.
 - ii. It is visible when users have the 'WarrantPickupLocationDetailEdit' security right.
 - h. View History Button:
 - i. This button will open the Transaction History Detail page to display update history made by users.
 - ii. It is visible when users have the 'WarrantPickupLocationDetailEdit' security right.
- 5. The page will have the following buttons:
 - a. Add:
 - i. This button will navigate users to Warrant Pickup Location Detail in Create mode.
 - ii. It is visible when users have the 'WarrantPickupLocationDetailEdit' security right.
 - b. Remove:
 - i. This button will remove selected record. It is visible when:
 - 1. Users have the 'WarrantPickupLocationDetailEdit' security right.
 - 2. There are records displayed on the page.
 - c. Close:
 - i. This button will navigate users to Case Summary page.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Warrant Pickup Location List**

2.1.5 Security Updates

1. Security Rights

| Security Right | Right Description | Right to Group Mapping |
|---------------------------------|---|--|
| WarrantPickupLocationListView | Ability to view Pickup Location List page | Warrant Pickup Location List View Pickup Location Detail Edit |
| WarrantPickupLocationDetailEdit | Ability to add/Edit/remove Pickup Location Details. Ability to view history of changes on a Pickup Location Detail | Warrant Pickup Location Detail Edit |
| | | |

2. Security Groups

| Security Group | Group Description | Group to Role Mapping |
|-------------------------------------|---|-----------------------|
| Warrant Pickup Location List View | Give users the ability to access Pickup Location List page. | County discretion |
| Warrant Pickup Location Detail Edit | Give users the ability to add/edit/remove Pickup Location Details. Give users the ability to view update history of a Pickup Location Detail | County discretion |
| | | |

2.1.6 Page Mapping

Add page mapping for this page.

2.1.7 Accessibility

The new page will be accessed for Accessibility requirements and should meet the Accessibility requirements.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Warrant Pickup Location Detail

2.2.1 Overview

This page will allow users to add/Edit a Pickup Location for a payee under a program.

2.2.2 Warrant Pickup Location Detail Mockup

The screenshot shows a form titled "Warrant Pickup Location Detail". At the top left, there is a legend: "* - Indicates required fields". At the top right, there are "Save" and "Cancel" buttons. The form contains four required fields: "Program:" (dropdown menu with "- Select -"), "Payee Type:" (dropdown menu with "- Select -"), "Supplemental Issuance Location:" (dropdown menu), and "Monthly Benefits Location:" (dropdown menu). At the bottom right, there are "Save" and "Cancel" buttons.

Figure 2.2.1 – Warrant Pickup Location Detail Create

This screenshot shows the form with "Person" selected in the "Payee Type:" dropdown. The "Program:" dropdown is still "- Select -" and the "Payee:" dropdown is "- Select -". "Save" and "Cancel" buttons are at the top right.

Figure 2.2.2 – 'Person' Payee Type

This screenshot shows the form with "Resource" selected in the "Payee Type:" dropdown. The "Program:" dropdown is "- Select -" and the "Payee:" dropdown is "Select". "Save" and "Cancel" buttons are at the top right.

Figure 2.2.3 – 'Resource' Payee Type

The screenshot shows the form titled "Warrant Pickup Location Detail" in edit mode. The legend "* - Indicates required fields" is present. The "Program:" field is filled with "CalWORKs". The "Payee Type:" field is filled with "Person". The "Payee:" field is filled with "Doe, John 60M". The "Supplemental Issuance Location:" dropdown is set to "03 - 170 Ancillary". The "Monthly Benefits Location:" dropdown is empty. "Save" and "Cancel" buttons are at the top right and bottom right.

Figure 2.2.4 – Warrant Pickup Location Detail Edit

Warrant Pickup Location Detail

* - Indicates required fields

Save Cancel

| | | |
|--|--|---------------------------------|
| Program: * Welfare to Works | Payee Type: * Person | Payee * Doe, John 60M |
| Supplemental Issuance Location: * 03 - 170 Ancillary | Monthly Benefits Location: N/A | |

Save Cancel

Figure 2.2.5 – Warrant Pickup Location Detail Edit

Select Resource

Cancel

Search

| | | |
|---|---|--|
| Name: <input type="text"/> | ID: <input type="text"/> | Status: <input type="text"/> |
| Category: <input type="text"/> | Type: <input type="text"/> | |
| Address: <input type="text"/> | Approved for County Use: <input type="text"/> | |
| City: <input type="text"/> | State: <input type="text"/> | Zip Code: <input type="text"/> |
| Vendor ID: <input type="text"/> | Tax ID: <input type="text"/> | |

Results per Page: 25 Search

Cancel

Figure 2.2.6 – Select Resource

2.2.3 Description of Changes

1. Create a new Warrant Pickup Location Detail page that will be visible to users with the 'WarrantPickupLocationDetailEdit' security right.
2. The page includes the following field:
 - a. Program:
 - i. This field will provide a list of all cash programs associated to the case. Please see Appendix 1 for the list of cash programs.
 - ii. This field is mandatory and is editable only in create mode.

- b. Payee Type:
 - i. Selectable options are 'Person' and 'Resource'.
 - ii. This field is mandatory and is editable only in create mode.
- c. Payee:
 - i. When 'Person' is selected as Payee Type, the field will provide a list of all persons associated to the case. Please see figure 2.2.2.
When 'Resource' is selected as Payee Type, an 'Select' button will be displayed. Please see figure 2.2.3.
When the program is Foster Care, Kin-GAP, or AAP, it will navigate the users to the 'Select Foster Care Resource' page. For other programs, it will navigate the users to the 'Select Resource' page which allow users to search and select any Resource - including Money Management Resources and Foster Care Resources. Please see Figure 2.2.6
 - ii. This field is mandatory and is editable only in create mode.
- d. Supplemental Issuance Location:
 - i. Selectable values are from Category Pickup Location (ID 112421) and are county-based.
 - ii. This field is mandatory only when a **non-main** payroll program is selected and is editable in both create and edit mode.
- e. Monthly Benefits Location:
 - i. Selectable values are from Category Pickup Location (ID 112421) and are county-based.
 - ii. This field is **non-mandatory** and editable in both create and edit mode when a main payroll program is selected. It will display 'N/A' and become non-editable for a **non-main** payroll program.

Note: Only San Francisco County currently has locations set up.

3. Add a new validation message '**Supplemental Issuance Location or Monthly Benefits Location is required. Please make a selection.**'
 - i. The validation will be triggered when:
 1. A main payroll program is selected.
 2. Supplemental Issuance Location and Monthly Benefits Location are blank.
4. Add a new validation message '**Warrant Pickup Location already exists for the payee and the program**' when users try to save a record for the payee and the program that already exists.
5. The page will have the following buttons:
 - a. Save:
 - i. This button will save the record and navigate users to Warrant Pickup Location List page.
 - b. Cancel:

- i. This button will **not** save the record and navigate users to Warrant Pickup Location List page.

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Pickup Location List**

2.2.5 Security Updates

1. Security Rights

| Security Right | Right Description | Right to Group Mapping |
|---------------------------------|---|--|
| WarrantPickupLocationListView | Ability to view Pickup Location List page | Warrant Pickup Location List View Pickup Location Detail Edit |
| WarrantPickupLocationDetailEdit | Ability to add/Edit/remove Pickup Location Details. Ability to view history of changes on a Pickup Location Detail | Warrant Pickup Location Detail Edit |
| | | |

2. Security Groups

| Security Group | Group Description | Group to Role Mapping |
|-----------------------------------|---|-----------------------|
| Warrant Pickup Location List View | Give users the ability to access Pickup Location List page. | County discretion |

| Security Group | Group Description | Group to Role Mapping |
|-------------------------------------|---|-----------------------|
| Warrant Pickup Location Detail Edit | Give users the ability to add/edit/remove Pickup Location Details. Give users the ability to view update history of a Pickup Location Detail | County discretion |
| | | |

2.2.6 Page Mapping

Add page mapping for Pickup Location Detail page.

2.2.7 Accessibility

The new page will be accessed for Accessibility requirements and should meet the Accessibility requirements.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Issuance Method Detail

2.3.1 Overview

The Issuance Method Detail page determine how benefits are issued for a particular program. The page is accessed via Program Detail page. The user can view the current issuance method information or click the Edit button to make changes.

2.3.2 Description of Changes

1. Remove the drop-down field "Pickup Location" and its page mapping.

2.3.3 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Program Detail**

2.3.4 Security Updates

No changes.

2.3.5 Page Mapping

Remove the page mapping of the "Pickup Location" field.

2.3.6 Accessibility

The page has been accessed for Accessibility requirements and meets the Accessibility requirements.

2.3.7 Page Usage/Data Volume Impacts

No changes.

2.4 CalWIN Warrant Print Writer

2.4.1 Overview

The CalWIN Warrant Print Writer will send necessary information for CalWIN counties to print and issue warrants.

2.4.2 Description of Change

1. Update the writer to determine a pickup location from the new Warrant Pickup Location List page when the following conditions are met:
 - a. The program of the Warrant Pickup Location matches the program of the warrant.
 - b. The Payee of the Warrant Pickup Location matches the payee of the warrant.
 - c. The deliver method is 'Pickup'.
 - d. 'Monthly Benefits Location' will be assigned to Monthly Benefits warrants, and 'Supplemental Issuance Location' will be assigned to other non-Monthly Benefits warrants.

Note: The system assign 'Mail' as the delivery method for Auxiliary Payments and Collection Refund. Hence, the warrant print writer will not include the pickup location for these warrants.

2. Remove the logic that defaults the location of Welfare to Work Routine Warrants to '170 Otis'.

2.4.3 Execution Frequency

No changes.

2.4.4 Key Scheduling Dependencies

No changes.

2.4.5 Counties Impacted

CalWIN Counties.

2.4.6 Data Volume/Performance

No changes.

2.4.7 Interface Partner

CalWIN Counties.

2.4.8 Failure Procedure/Operational Instructions

No changes

2.5 Issuance Batch

2.5.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis.

2.5.2 Description of Change

1. Update the Skip Issuance logic to:
 - a. apply new actionable skip issuance when authorizing EDBC or Payment Requests met the following conditions:
 - i. The Immediacy is Routine.
 - ii. The Type is Warrant.
 - iii. The deliver method is 'Pickup'.
 - iv. The County issuing benefits is San Francisco.
 - v. If the location is missing for a Monthly Benefits warrant, skip the issuance with the reason 'Missing Monthly Benefits Location for the warrant to be picked up'.
If the location is missing for a non-Monthly Benefits warrant, skip the issuance with the reason 'Missing Supplemental Issuance Location for the warrant to be picked up'.
 - b. apply new actionable skip issuance reasons when authorizing EDBC or Payment Requests met the following conditions:
 - i. The Immediacy is Routine.
 - ii. The Type is Warrant.
 - iii. The deliver method is 'Mail'.
 - iv. The County issuing benefits is San Francisco.
 - v. If a location is set up for a Monthly Benefits warrant, skip the issuance with the reason 'Monthly Benefits Location is **not** allowed for the warrant delivered by mail'.
If the location is set up for a non-Monthly Benefits warrant, skip the issuance with the reason 'Supplemental Issuance Location is **not** allowed for the warrant delivered by mail'.

Please refer to Appendix 3 for scenarios of Skip Issuance behaviors.

Note:

- o Money Management allows benefits to be split between the customer and vendor(s). The system will not issue any payments tied to an EDBC if one payment is skipped because of the missing Pickup Location.
- o Section [2.6](#) will migrate existing default locations and add default locations to minimize issuances being skipped when the SCR is implemented.

2.5.3 Execution Frequency

No changes.

2.5.4 Key Scheduling Dependencies

No changes.

2.5.5 Counties Impacted

San Francisco County.

2.5.6 Data Volume/Performance

No changes.

2.5.7 Failure Procedure/Operational Instructions

No changes

2.6 DCR to migrate Pickup Locations

2.6.1 Overview

Perform a one-time DCR to migrate Pickup Locations from Issuance Detail page. Below programs will have both Monthly Benefits Location and Supplemental Issuance Location migrated:

- a. Foster Care
- b. AAP
- c. Kin-GAP
- d. GA/GR Automated Solution
- e. CAPI

Below programs will have only Supplemental Issuance Location migrated.

- a. Homeless – Perm
- b. Homeless – Temp
- c. CalWORKs
- d. RCA
- e. Diversion
- f. Welfare to Work
- g. Immediate Need

2.6.2 Description of Change

1. Insert a new Pickup Location Detail when the follow conditions are met:

- a. The program is one of the following:
 - o Foster Care
 - o AAP
 - o Kin-GAP
 - o GA/GR Automated Solution
 - o CAPI
- b. There is an Accepted and Saved EDBC authorizing benefits for the upcoming main payroll after the implementation. For example, if the SCR is implemented on 9/23/2024 for 24.09 release. The next Cash and Food Main Pay roll run is 10/25/2024 to issue 11/2024 benefits, and the next Foster Care Main Pay roll run is 10/2/2024 to issue 9/2024 benefits. The DCR will look for Kin-GAP, AAP, CAPI and GA/GR EDBC with 11/2024 benefit month and FC EDBC with 9/2024 benefit month.
- c. The authorizing EDBC has Pickup as the Delivery Method.
- d. A valid Pickup Location is specified in Issuance Method Detail page for the respective program.

Insert a new Pickup Location Detail with information-

- a. Program: The program of EDBC.
- b. Payee: The Payee(s) of the EDBC. For GA/GR and CAPI, the DCR will also create pickup locations for vendors who will receive payments authorized via Money Managements.
- c. Payee Type: Based on the payee, it can be Person or Resource.
- d. Supplemental Issuance Location: for GA/GR Automated Solution , use '26 - 1235 Mission'. For other programs, use the location specified in Issuance Method Detail.
- e. Monthly Benefits Location: The location specified in Issuance Method Detail.

2. Insert a new Pickup Location Detail when the follow conditions are met:

- a. The program is one of the following:
 - o Homeless – Perm
 - o Homeless – Temp
 - o CalWORKs
 - o RCA
 - o Diversion
 - o Welfare to Work
 - o Immediate Need
- b. A valid Pickup Location is specified in Issuance Method Detail page.

Insert a new Pickup Location Detail with information-

- a. Program: Program of the Issuance Method Detail

- b. Payee: The Payee (admin role) of the program
- c. Payee Type: Based on the payee, it can be Person or Resource.
- d. Supplemental Issuance Location: The location specified in Issuance Method Detail.
- e. Monthly Benefits Location: Blank

2.6.3 Estimated Number of Records Impacted/Performance

Approximately 2000 records.

2.7 Automated Regression Test

2.7.1 Overview

Create automated regression test scripts to verify the Program selection and filtering on the Warrant Print Location List page, and core functionality of the Warrant Pickup Location Detail page.

Note: San Francisco County will be used for execution due to the code category dependency.

2.7.2 Description of Change

1. Create regression scripts to verify the Program dropdown on the Warrant Pickup Location List page:
 - a. Contains only applicable cash aid programs.
 - b. Contains only programs associated to the case in context.
 - c. Restricts search results based on the selected value.
2. Create regression scripts to verify the following on the Warrant Pickup Location Detail page:
 - a. Monthly Benefits Location displays a static 'N/A' text value for non-main payroll programs.
 - b. Supplemental Issuance Location is required for non-main payroll programs.
 - c. Monthly Benefits Location is selectable for main payroll programs.
 - d. The page can be saved with a Supplemental Issuance Location selected and no Monthly Benefits Location selected for a main payroll program.
 - e. The page can be saved with a Monthly Benefits Location selected and no Supplemental Issuance Location selected for a main payroll program.
 - f. The page can be saved with both Supplemental Issuance Location and Monthly Benefits Location values selected for a main payroll program.
 - g. A validation error message displays when attempting to save the page with neither Supplemental Issuance Location nor

Monthly Benefits Location values selected for a main payroll program.

h. A validation error message displays when attempting to save the page when another record for the same payee and program already exists.

Technical Note: At least one applicable program will be verified for each scenario above. The scenarios will not be repeated for each applicable program.

3. Create regression scripts to verify that clicking the 'Select' button on the Warrant Pickup Location Detail page navigates the user to the Select Foster Care Resource page when the Payee field is set to 'Resource' and the Program field is set to each of the following values:
 - a. AAP
 - b. Foster Care
 - c. Kin-GAP
4. Create regression scripts to verify that clicking the 'Select' button on the Warrant Pickup Location Detail page navigates the user to the Select Foster Care Resource page when the Payee field is set to 'Resource' and the Program field is set to each of the following values:
 - a. CalWORKs
 - b. RCA
5. Create regression scripts to verify the page mapping field names for each of the following pages:
 - a. Issuance Method Detail
 - b. Warrant Pickup Location Detail
 - c. Warrant Pickup Location List

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|-------------|------------|
| | | | |
| | | | |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-------|------------------|---------------------|
|-------|------------------|---------------------|

| | | |
|----------|--|--|
| 2.10.1.2 | The LRS shall include the ability to issue benefits via EBT, direct deposit, or warrants and/or checks distributed to the payee and shall issue appropriate notices. | Add a new Warrant Pickup Location List and Detail pages to be available for multiple payees under a program. |
| | | |

5 OUTREACH

5.1 Lists

Provide a list of Added Pickup Locations from section 2.6 to San Francisco County.

List Name: Pickup Locations by DCR

List Criteria: Please see requirement 2.6.

Standard Columns:

- Case Number
- Program
- Payee
- Payee Type
- Supplemental Issuance Location
- Monthly Benefits Location

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2024>CA-271707

6 APPENDIX

1. Below are Programs available for users to set up Pickup Locations:

- AA - Adoptions Assistance Program
- CW - CalWORKs
- CP - Cash Assistance Program for Immigrants
- CC - Child Care
- DV - Diversion
- WT - Welfare to Work
- FC - Foster Care
- KG - Kin-GAP
- RC - Refugee Cash Assistance
- CL - Cal-Learn
- IN - Immediate Need
- HT - Homeless Assistance - Temporary
- HP - Homeless Assistance - Permanent
- RE - Refugee Employment Program
- GR - GA/GR Automated Solution
- GE - GA/GR Employment Services
- GI - General Assistance/General Relief Immediate Need

2. Below are Main Payroll Programs for SFO:

- AAP

- CAPI
- CalFresh
- CalWORKs
- Foster Care
- GA/GR Automated Solution
- Homeless – Perm
- Homeless – Temp
- Immediate Need
- Kin-GAP
- RCA

3. Skip Issuance Scenarios:

| Delivery Method of Warrants | A Pickup Location set up for the Payee on the new page. | Issuance Batch to Skip Issuance | Pick up location on Writer File |
|-----------------------------|---|---|--|
| Mail | Yes | Yes with the reason 'Monthly Benefits Location is not allowed for the warrant delivered by mail' or 'Supplemental Issuance Location is not allowed for the warrant delivered by mail' | |
| Mail | No | No | blank |
| Pick up | Yes | No | Based on the location set up on the new page |
| Pick up | No | Yes with the reason 'Missing Supplemental Issuance Location for the warrant to be picked up' or 'Missing Monthly Benefits Location for the warrant to be picked up' | |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-272640

Turn on/update Person Removal Batch

| | | |
|----------------|----------------------------------|--|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Edgars Reinholds |
| | Reviewed By | Dymas Pena, Pandu Gupta, Trevor Torres, Mathew Lower, Gillian Bendicio, Melissa Mendoza, Tiffany Huckaby, Ravneet Bhatia, Esequiel Herrera-Ortiz |

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| 03/12/2024 | 1.0 | Initial version | Edgars Reinholds |
| 10/2/2024 | 1.1 | Content Revision | Edgars Reinholds |
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1 OVERVIEW

Orphan persons exist and are created regularly in CalSAWS. This SCR will turn on and update the Orphan Person Clean up batch job.

1.1 Current Design

Creating a new application and a case goes through several pages. Each page's records are committed before proceeding to the next page. If the workflow is not completed to case creation, then the persons remain as Orphans. They could be selected for a new application, but also the worker has the option to create a new person again.

CalSAWS has two batch jobs to mitigate this issue that have not run since C-IV migration:

- PB00S302 – Orphan Person Cleanup
 - This job finds Orphan Person records not having a case person or program person link in addition several other tables.
 - Deletes e-App person record, PERS record and related tables.
- PB00S300 – Orphan Address Cleanup
 - This job finds Orphan Address records not having any link to tables that have a foreign key constraint.
 - Deletes the orphan address record.

1.2 Requests

Turn on and update PB00S302 with the latest tables PERS related tables.

Turn on PB00S300 to clean up orphan ADDR records.

1.3 Overview of Recommendations

1. Turn on and update PB00S302 with the latest tables PERS related tables.
2. Turn on PB00S300 to clean up orphan ADDR records.
3. Regression test Case Link, Case Inquiry and Notices APIs.

1.4 Assumptions

1. Orphan PERS records are not case persons and thus only appear on the person search.
2. Orphan ADDR records are addresses that are not linked to any other table.
3. If the worker does not complete the intake flow to create a case, then batch will remove the orphaned person on the same day during nightly batch.
4. SCR CA-264934 will clean up all the existing orphan person and address records so that the batch jobs will process new orphan records going forward.

2 RECOMMENDATIONS

Turn on Orphan Person (PB00S302) and Address (PB00S300) clean up jobs. Regression test APIs.

2.1 Turn on and Update Orphan Person Cleanup job (PB00S302)

2.1.1 Overview

Turn on and Update Orphan Person Cleanup job PB00S302.

2.1.2 Description of Change

1. Remove PERS_QUALFR table from the driving query.
2. Remove C4Y (e-App) related tables from the delete logic and the following tables:
 - a. SIGN_REGISTR
 - b. SIGN_REGISTR_DETL
 - c. SIGN_REGISTR_ANSWER
3. Update the delete logic to set C4Y_PERS.C4_PERS_ID to null for the orphan person being deleted.
4. Add the following tables to be deleted from due to PERS foreign key constraints:
 - a. PERS_QUALFR
5. Create a BPCR/BSCR to turn on Orphan Person Cleanup job PB00S302.
6. Add the following tables to the driving query to exclude the person from being picked up if they are referenced in any of these tables.
 - a. C4Y_PERS_LOGIN_INFO
 - b. CHILD_PLACEMT_ISP
 - c. CHILD_PLACEMT_VERIF
 - d. AAP_PLACEMT

Note: This corresponds with the tables not being deleted from by the cleanup DCR of SCR CA-264934. Otherwise, the records would exception out every day.

2.1.3 Execution Frequency

Daily - No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Category

Non-Core.

2.1.7 Data Volume/Performance

3,800,000 initial volume. Approximately 50,000 orphan records ongoing monthly for all counties.

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...)

2.2 Turn on and Update Orphan Address Cleanup job (PB00S300)

2.2.1 Overview

Turn on Orphan Address Cleanup job PB00S300.

2.2.2 Description of Change

1. Create a BSCR to turn on Orphan Address Cleanup job PB00S300.

2.2.3 Execution Frequency

Daily - No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All Counties.

2.2.6 Category

Non-Core.

2.2.7 Data Volume/Performance

Estimated: 3,400,000 initial volume, plus the additional 3,800,000 orphan persons potential.

Approximately 20,000 orphan addresses ongoing monthly for all counties.

2.2.8 Failure Procedure/Operational Instructions

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

2.3 Regression Test APIs

2.3.1 Overview

The Case Link, Case Inquiry, and Notices APIs are portal services that support the Self-Service Portal (SSP) to enable a customer to view their case information and forms/documents. These APIs utilize the tables in the database that the Orphan Person Cleanup Job checks when deleting an orphaned person record.

2.3.2 Description of Change

1. Regression test Case Link, Case Inquiry and Notices APIs after orphan persons are cleaned up.

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. | Orphaned person and address will be removed. |
| | | |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-272652

Create County Duplicate Impact List pages

| CalSAWS | DOCUMENT APPROVAL HISTORY | |
|---------|---------------------------|---|
| | Prepared By | Trevor Torres, Matthew Lower, Howard Suksanti, William Baretsky |
| | Reviewed By | Ignacio Lazaro, Dymas Pena |

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|------------|------------------|--|-----------------|
| 02/14/2024 | 1.0 | Initial Design | Trevor Torres |
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| 10/3/2024 | 1.2 | Update on section 2.3.2. | Howard Suksanti |
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1 OVERVIEW

Currently any county can mark a person as a duplicate from a different county. This can cause issues with the counties when a person under their county is marked as a duplicate without their awareness. This SCR will create two new pages to notify when duplicate person is impacting the counties.

1.1 Current Design

Currently, any county can mark a single person record as a duplicate which can impact cases in other counties. This can cause issues with the counties when a person under their county is marked as a duplicate without their awareness.

1.2 Requests

Create a new page that will notify counties when a duplicate person is impacting them.

1.3 Overview of Recommendations

1. Create a new search page called "County Duplicate Impact List".
 - a. When a person is marked as a duplicate from the "Duplicate Person List" page, it will be recorded as an instance on this page and display the appropriate information when searched for.
 - i. Persons with multiple cases will have multiple instances displaying.
 - b. This page will be located in "e-Tools" under a new Task labeled "County Duplicate Impact".
 - i. This new Task will only display if the user is assigned to the new 'CountyDuplicateImpactView' Security Right.
2. Create a new page called "County Duplicate Impact Detail".
 - a. This page will display detailed information about the instance from the "County Duplicate Impact List" page.
 - b. The Edit mode of this page will allow users to change the "Status" field in the "General Duplicate Information" section, mark or unmark sections as "Reviewed:", and be able to add comments to why the 'Status' was changed.
 - i. This Edit mode of the page is accessed through either the "Edit" button on the "County Duplicate Impact List" page or the "Edit" button on the "County Duplicate Impact Detail" Page.
 1. These buttons will only display if the user is assigned to the new Security Right "CountyDuplicateImpactDetailEdit".
3. Create new batch to populate County Duplicate Impact Detail page.

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.
2. Existing records that are currently marked as a “duplicate” will not be included in the “County Duplicate Impact List” page upon release. Only the records that have been marked as duplicate after these pages have been implemented will be added to the “County Duplicate Impact List” page.
3. The EBT section on the County Duplicate Impact Detail page will not display any EBT card that has not yet been added to CalSAWS. The worker has the option to add the cards in CalSAWS through the EBT Account page.
4. The Recovery Account section on the County Duplicate Impact Detail page will display only the Active Recovery account.

2 RECOMMENDATIONS

Currently, any county can mark a single person record as a duplicate which can impact cases in other counties. This can cause issues with the counties when a person under their county is marked as a duplicate without their awareness.

2.1 County Duplicate Impact List

2.1.1 Overview

This page allows you to search for a person's record that was marked as a duplicate and impacts a county.

2.1.2 County Duplicate Impact List Mockup



Figure 2.1.2.1 – County Communications E-Tools New Task Mockup

County Duplicate Impact List

▼ Refine Your Search

Search

| | | |
|--|--|--|
| Last Name: <input type="text"/> | First Name: <input type="text"/> | Middle/Initial Name: <input type="text"/> |
| Case Number: <input type="text"/> | CIN: <input type="text"/> | Date of Birth: <input type="text"/> |
| From: * <input type="text" value="12/01/2023"/> | To: * <input type="text" value="01/30/2024"/> | Status: <input type="text" value="New"/> |
| Staff ID: <input type="text"/> | | |

Results per Page: Search

This Type 1 page took 0.33 seconds to load.

Figure 2.1.2.2 – County Duplicate Impact List page before Search Mockup

County Duplicate Impact List

▼ Refine Your Search

Search

| | | |
|--|--|--|
| Last Name: <input type="text" value="Johnson"/> | First Name: <input type="text"/> | Middle/Initial Name: <input type="text"/> |
| Case Number: <input type="text"/> | CIN: <input type="text"/> | Date of Birth: <input type="text"/> |
| From: * <input type="text" value="12/01/2023"/> | To: * <input type="text" value="01/30/2024"/> | Status: <input type="text"/> |
| Staff ID: <input type="text"/> | | |

Results per Page: Search

| Search Results Summary | | | | | Results 1 - 3 of 3 |
|--|-------------------------|-----------|------------|--------------|----------------------|
| Name | Case Number | CIN | Status | Created Date | |
| Johnson, Kyle 47M(dup) | 1111111 | 12345678A | New | 12/01/2023 | Edit |
| Johnson, Kyle 47M(dup) | 5555555 | 12345678A | New | 12/01/2023 | Edit |
| Johnson, Picard 34M(dup) | 2222222 | 90123456B | In-Process | 12/23/2023 | Edit |
| Johnson, Mike 24F(dup) | 7777777 | 78901234C | Completed | 01/15/2024 | Edit |

This Type 1 page took 0.33 seconds to load.

Figure 2.1.2.3 – County Duplicate Impact List page after Search Mockup

2.1.3 Description of Changes

1. Create a new page called "County Duplicate Impact List".
 - a. When a person is marked as a duplicate from the "Duplicate Person List" page, it will be recorded as an instance on this page and display the appropriate information after an overnight Batch Job (see section 2.3 for more information), as shown in Figure 2.1.2.3.
 - i. The records being displayed will only be the records for impacted cases within the user's county.
 - ii. Persons with multiple cases will have multiple instances displaying.
 - b. The "Last Name", "First Name", "Middle/Initial Name", "Case Number", "CIN", and "Date of Birth" search fields will search for records in the "County Duplicate Impact List" page with the same field name values in them and display in the "Search Results Summary" in their appropriate fields after selecting the "Search" button.
 - c. The "Status" search field will search for records in the "County Duplicate Impact List" page with the same values as the selected value from the dropdown (except for "Blank") in them and display in the "Search Results Summary" in the "Status" field after selecting the "Search" buttons.
 - i. The "Status" dropdown field will display the following options:
 1. "Blank"
 2. New
 3. In-Process
 4. Completed
 - ii. The page will default the "Status" field to "New" when accessing the page, as shown in Figure 2.1.2.2, but can be manually changed to any of the above options.
 - d. The "Staff ID" search option will find instances that were made by a certain staff member, however there will not be a "Staff ID" to display in the results.
 - e. The "To:" field will auto populate with the day the user accesses the page and the "From:" field will auto populate the date 60 days before the "From:" field.
 - i. These fields will be required.
 - ii. Display a validation message when the user clicks on the "Search" button and if the range goes beyond the 60 days.
 1. The validation will display the following message: "To – Maximum range is 60 days. Please adjust the range."
 - iii. Display a validation message when the user clicks on the "Search" button when either of the text-area fields have 0 characters.

1. The validation will display the following message if the "To:" field is empty: "To – Field is required. Please enter a value."
 2. The validation will display the following message if the "From:" field is empty: "From – Field is required. Please enter a value."
- iv. Display a validation message when the user clicks on the "Search" button when the date in "From:" is greater than the date in "To:".
1. The validation will display the following message: "From – Date is greater than date in "To". Please enter a date that is before the date in "To".
- f. The "Search" buttons when selected will find records in the "County Duplicate Impact List" page that match with the inputted search fields.
- g. The default sorting will be based on the "Created Date" field, with the most recent date displaying first and follow chronologically. Additional cases/instances tied to that person will also be sorted based on the most recent date.
- h. Using the hyperlink on the name of the duplicate person will take the user to the 'View' mode of the "County Duplicate Impact Detail" page of that duplicate person's record.
- i. Using the "Edit" button next to a duplicate person's record will take the user to the 'Edit' mode of the "County Duplicate Impact Detail" page of that duplicate person's record.
- i. The "Edit" button will only display if the user has the new Security Right "CountyDuplicateImpactDetailEdit".
- j. This page will be located in the Global Toolbar "e-Tools" under a new Task Header labeled "County Communications" when a new task labeled "County Duplicate Impact" will display, as shown in Figure 2.1.2.1.
- i. The "County Duplicate Impact" Task will not display if the user does not have the 'CountyDuplicateImpactView' Security Right. See Section 2.1.5 for more information.

2.1.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** County Duplicate Impact (This will only appear if the user has the new Security Right 'CountyDuplicateImpactView')

2.1.5 Security Updates

Adding new Security Rights and Security Groups for the new 'County Duplicate Impact List' and 'County Duplicate Impact Detail' pages.

1. Security Rights

| Security Right | Right Description | Right to Group Mapping |
|---------------------------------|---|---|
| CountyDuplicateImpactView | View county duplicate impact person(s) list and detail pages for impacted person record(s). | County Duplicate Impact View, County Duplicate Impact Detail Edit |
| CountyDuplicateImpactDetailEdit | Identify and update status of impacted duplicate person(s) records from the list page. | County Duplicate Impact Detail Edit |

2. Security Groups

| Security Group | Group Description | Group to Role Mapping |
|-------------------------------------|---|----------------------------------|
| County Duplicate Impact View | View county duplicate impact person(s) list and detail. | View Only |
| County Duplicate Impact Detail Edit | Edit county duplicate impact person(s) detail status and make comments. | (County Determines Role Mapping) |

2.1.6 Page Mapping

Create the Page Mapping for the new page.

2.1.7 Accessibility

This page will be created to meet the Accessibility requirements and standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 County Duplicate Impact Detail

2.2.1 Overview

This page allows you to view a person record within the cases of an impacted county that has been marked as a Duplicate. User's that are able to 'Edit' the record will be able to change the "Status" of the record, mark or unmark sections as "Reviewed:", and make comments on the change to the "Status" for the record.

2.2.2 County Duplicate Impact List Mockup

County Duplicate Impact Detail

*- Indicates required fields Edit Close

| General Duplicate Information | | | Reviewed: No |
|-------------------------------|-----------------------------|--|--------------|
| Last Name: Johnson | First Name: Kyle | Middle Name/Initial: | |
| Case Number <u>5555555</u> | CIN: 12345678A | Date of Birth: 01/01/1984 | |
| Status: New | Created Date: 11/01/2023 | Associated Cases: <u>Kyle Johnson</u> | |

| ▼ Program(s) as of Created Date | | | Reviewed: No |
|-----------------------------------|--------------------------------|--------------|--------------|
| Associated Program(s): MediCal | Person Status: Deregistered | Role: MEM | |
| CalFresh | Deregistered | MEM | |

| Golden Record | | | | Reviewed: No |
|----------------------------------|------------------------------|-------------------|---------------------|--------------|
| Name: <u>Kyle Jr. Johnson</u> | Date of Birth: 01/01/1984 | CIN: 12345678A | SSN: 555-55-5555 | |

Add Person

Figure 2.2.2.1 – County Duplicate Impact Detail ‘View’ Mode 1st half Mockup

| Associated Cases: | |
|---------------------|--------|
| <u>Kyle Johnson</u> | |
| Case Number | County |
| 1111111 | 19 |
| 5555555 | 19 |

ed: No

Figure 2.2.2.2 – County Duplicate Impact Tool Tip “Associated Cases” Example Mockup

| EBT | | | | | Reviewed: No |
|--|--|---|--|------------------------------|----------------------------|
| Account Number: 1111111111111111 | Primary Card Holder: Johnson, Kyle 47M(dup) | Secondary Card Holder: Johnson, Kyle 47M(dup) | Current Address: 1111 Street Avenue | EBT Status: Active | Card Status: New |

| Recovery Account | | | Reviewed: No |
|--|----------------------------------|----------------------------------|--------------|
| Recovery Account Number: 222222222 | Program Type: CalFresh | Benefit Month: 01/2024 | |

| Time Limit Summary Links | | Reviewed: No |
|--|--|--------------|
| Duplicate Person Link Johnson, Kyle 47M(dup) | | |

| IPVs | | | Reviewed: No |
|--|--|--------------------------------------|--------------|
| Name: Johnson, Kyle 47M(dup) | Court Ordered Date: 01/05/2024 | Effective Date: 01/05/2024 | |

| ▼ Absent/Unmarried Parent(s) | | | | Reviewed: No |
|--|----------------------------|---------------------------|--|--------------|
| Name: Schmidt, Mike 67M(dup) | SSN: 444-44-4444 | DOB: 01/01/1987 | Address: 2222 Alley Street | |
| Name: Johnson, Kyle 47M(dup) | SSN: 111-11-1111 | DOB: 01/01/1984 | Address: 1111 Duplicate Street | |

| Self-Service Portal | | Reviewed: No |
|--|--|--------------|
| Relinking Reminder Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account. | | |

Edit
Close

This [Type 1](#) page took 1.21 seconds to load.

Figure 2.2.2.3 – County Duplicate Impact Detail View Mode 2nd half Mockup

| Golden Record | | | | Reviewed: No |
|----------------------------------|-------------------------------------|--------------------------|----------------------------|--------------|
| Name: Kyle Jr. Johnson | Date of Birth: 01/01/1984 | CIN: 12345678A | SSN: 555-55-5555 | |
| Add Person | Case Number | County | | |
| | 9999999 | 19 | | |
| | 8888888 | 18 | | |

Figure 2.2.2.4 – County Duplicate Impact Tool Tip “Golden Record” Example Mockup

County Duplicate Impact Detail

*- Indicates required fields

Save

Cancel

| General Duplicate Information | | | Reviewed: <input type="checkbox"/> |
|--|-----------------------------|---|------------------------------------|
| Last Name: Johnson | First Name: Kyle | Middle Name/Initial: | |
| Case Number 5555555 | CIN: 12345678A | Date of Birth: 01/01/1984 | |
| Status:* <input type="text" value="New"/> | Created Date: 11/01/2023 | Associated Cases: Kyle Johnson | |

| ▼ Program(s) as of Created Date | | | Reviewed: <input type="checkbox"/> |
|-----------------------------------|--------------------------------|--------------|------------------------------------|
| Associated Program(s): MediCal | Person Status: Deregistered | Role: MEM | |
| CalFresh | Deregistered | MEM | |

| Golden Record | | | | Reviewed: <input type="checkbox"/> |
|---|------------------------------|-------------------|---------------------|------------------------------------|
| Name: Kyle Jr. Johnson | Date of Birth: 01/01/1984 | CIN: 12345678A | SSN: 555-55-5555 | |

Add Person

Figure 2.2.2.5 – County Duplicate Impact Detail Edit Mode 1st part Mockup

| EBT | | | | | | Reviewed: <input type="checkbox"/> |
|---|---|--|---|-----------------------|---------------------|------------------------------------|
| Account Number: 1111111111111111 | Primary Card Holder: Johnson, Kyle 47M(dup) | Secondary Card Holder: Johnson, Kyle 47M(dup) | Current Address: 1111 Street Avenue | EBT Status: Active | Card Status: New | |

| Recovery Account | | | Reviewed: <input type="checkbox"/> |
|--|---------------------------|---------------------------|------------------------------------|
| Recovery Account Number: 22222222 | Program Type: CalFresh | Benefit Month: 01/2024 | |

| Time Limit Summary Links | Reviewed: <input type="checkbox"/> |
|---|------------------------------------|
| Duplicate Person Link Johnson, Kyle 47M(dup) | |

| IPVs | | | Reviewed: <input type="checkbox"/> |
|---|-----------------------------------|-------------------------------|------------------------------------|
| Name: Johnson, Kyle 47M(dup) | Court Ordered Date: 01/05/2024 | Effective Date: 01/05/2024 | |

Figure 2.2.2.6 – County Duplicate Impact Detail Edit Mode 2nd part Mockup

▼ Absent/Unmarried Parent(s) Reviewed:

| | | | |
|--|----------------------------|---------------------------|--|
| Name: Schmidt, Mike 67M(dup) | SSN: 444-44-4444 | DOB: 01/01/1987 | Address: 2222 Alley Street |
| Name: Johnson, Kyle 47M(dup) | SSN: 111-11-1111 | DOB: 01/01/1984 | Address: 1111 Duplicate Street |

Self-Service Portal Reviewed:

Relinking Reminder
Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.

Comments

Save
Cancel

This [Type 1](#) page took 1.21 seconds to load.

Figure 2.2.2.7 – County Duplicate Impact Detail Edit Mode 3rd part Mockup

▼ Absent/Unmarried Parent(s) Reviewed: No

| | | | |
|--|----------------------------|---------------------------|--|
| Name: Schmidt, Mike 67M(dup) | SSN: 444-44-4444 | DOB: 01/01/1987 | Address: 2222 Alley Street |
| Name: Johnson, Kyle 47M(dup) | SSN: 111-11-1111 | DOB: 01/01/1984 | Address: 1111 Duplicate Street |

Self-Service Portal Reviewed: No

Relinking Reminder
Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.

▼ Change History Reviewed: No

| | | | |
|------------------------------------|---|---|------------------------------------|
| Staff Name: Peter Parker | Staff ID: 1234567 | Date Time Stamped 11/01/2023 08:00:00 | Status Change: Completed |
|------------------------------------|---|---|------------------------------------|

Comments:
Changed to Completed Status.

Edit
Close

This [Type 1](#) page took 1.21 seconds to load.

Figure 2.2.2.8 – County Duplicate Impact Detail View Mode “Change History” Mockup

▼ Absent/Unmarried Parent(s) Reviewed:

| | | | |
|--|----------------------------|---------------------------|--|
| Name: Schmidt, Mike 67M(dup) | SSN: 444-44-4444 | DOB: 01/01/1987 | Address: 2222 Alley Street |
| Name: Johnson, Kyle 47M(dup) | SSN: 111-11-1111 | DOB: 01/01/1984 | Address: 1111 Duplicate Street |

Self-Service Portal Reviewed:

Relinking Reminder
Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account.

▼ Change Information Reviewed:

| | | | |
|------------------------------------|---|---|------------------------------------|
| Staff Name: Peter Parker | Staff ID: 1234567 | Date Time Stamped 11/01/2023 08:00:00 | Status Change: Completed |
|------------------------------------|---|---|------------------------------------|

Comments:
Changed to Completed Status.

Comments

Save
Cancel

This [Type 1](#) page took 1.21 seconds to load.

Figure 2.2.2.9 – County Duplicate Impact Detail Edit Mode “Change History” Mockup

| EBT | | | | | Reviewed: <input checked="" type="checkbox"/> |
|--|--|---|--|------------------------------|---|
| Account Number: 1111111111111111 | Primary Card Holder: Johnson, Kyle 47M(dup) | Secondary Card Holder: Johnson, Kyle 47M(dup) | Current Address: 1111 Street Avenue | EBT Status: Active | Card Status: New |

Figure 2.2.2.10 – County Duplicate Impact Detail View Mode Check-Marked Example Mockup

2.2.3 Description of Changes

1. Create a new page called “County Duplicate Impact Detail”.
 - a. This page in View mode will display detailed information about the record.

- i. The information will only display the details obtained from the overnight Batch Job (See section 2.3 for more information).
 1. The information displaying will not be updated or editable (except for the "Status" field in the "General Duplicate Information" section) for the specific instance.
- ii. Each of the following sections will have "Reviewed:" to the right of their labels and will either display "Yes" or "No" depending on the checkboxes in 'Edit' mode.
 1. In 'View' mode, next to "Reviewed:" will display 'Yes' if the checkbox has been checked and saved when in 'Edit' mode, as shown in Figure 2.2.2.10.
 2. In 'View' mode, next to "Reviewed:" will display 'No' if the checkbox is not checked when in 'Edit' mode and saved, as shown in Figure 2.2.2.1 and Figure 2.2.2.3
- iii. The "General Duplicate Information" section will display demographic information, record status and created date, as shown in Figure 2.2.2.1.
 1. When a record is created for the "County Duplicate Impact Detail" page, the "First Name", "Middle Name", "Last Name", "Case Number", "CIN", and "Date of Birth" result fields will be populated from the duplicate record information from the "Individual Demographics Detail" page.
 - a. The "Case Number" field will only display one Case Number, which is based on the record selected from the "County Duplicate Impact List" page with the same Case Number.
 2. The "Status" field will display the status of the record that can be adjusted in the 'Edit' mode of this page.
 - a. The following options will display in the field:
 - i. New
 - ii. In-Process
 - iii. Completed
 - b. Newly created records on the "County Impact Duplicate Detail" page will have the "Status" field default to "New".
 - c. Records with the 'Status' of "Completed" will still be able to be editable.
 3. The "Created Date" field will display the date that this record was marked as a duplicate and added to the "County Impact Duplicate List" page.

4. The name displayed in the "Associated Cases" field will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.2.2.2.

Note: If the number of cases displaying in the Tooltip is greater than the length of the page, it will be cut off and be unable to display anymore cases.

- iv. The "Program(s) as of Created Date" section, as shown in Figure 2.2.2.1, will display:
 1. The programs associated with the duplicate person in the "Associated Program(s)" field.
 2. Their status is related to the program(s) in the "Person Status" field.
 3. The role they have for that program in the "Role" field.
 4. Make the "Program(s) as of Created Date" section collapsible.
 - a. The section will be collapsed by default.
- v. The "Golden Record" section will display the person record that is marked as the "Golden Record" for the duplicate person record the page is displaying, as shown in Figure 2.2.2.1.
 1. The fields will be populated from the "Individual Demographics Detail" page of the record that is the "Golden Record" of the duplicate person.
 2. The "Add Person" button will allow the user to add the Golden Record person that is being displayed in the "Golden Record" section as a Case Person to the case number of the Duplicate person that is being viewed.
 - a. If the Golden Record person is already a Case Person withing the case of the Duplicate person, then the button will dynamically disappear.
 - b. Users will only be able to see and use the "Add Person" button if they have the "CountyDuplicateImpactDetailEdit" Security Right assigned to them.
 3. The name displayed in the "Name" field of the "Golden Record" section will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.2.2.4.

- vi. The “EBT” section will display the information of the duplicate person on their current account with EBT.
 - 1. This section will pull the data elements from the ‘EBT Account Detail’ page to the following fields shown in Figure 2.2.2.3:
 - a. Account Number
 - b. Primary Card Holder
 - c. Secondary Card Holder
 - d. Current Address
 - e. EBT Status
 - f. Card Status
 - 2. The “Account Number” field will have a hyperlink that will take the user to the ‘EBT Account Detail’ page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s) to view.
 - 3. This section is dynamic based on if the Duplicate Person is associated to an active EBT Account.
- vii. The “Recovery Account” section will display the information of the duplicate person if the recovery account has not been resolved as of being marked as a Duplicate.
 - 1. This Section will pull the data elements from the ‘Overissuance Detail’ page to the following fields shown in Figure 2.2.2.3:
 - a. Recovery Account Number
 - b. Program Type
 - c. Benefit Month
 - 2. The “Recovery Account Number” field will have a hyperlink that will take the user to the ‘Recovery Account Detail’ page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. This section is dynamic based on if the Duplicate Person is associated to an unresolved Recovery Account when being marked as a Duplicate.
- viii. The “Time Limit Summary Links” section will display the “Duplicate Person Link” field shown in Figure 2.2.2.3.
 - 1. The hyperlink under the “Duplicate Person Link” field will take the user to the ‘Time Limit Summary’ page of the duplicate person if the user has the appropriate Security Right(s) to view that page.

- a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 2. This section is dynamic based on if the Duplicate Person is associated to a Time Limits Account.
- ix. The "IPV" section will display the information of the duplicate person if there is a Court Order that has not been resolved as of being marked as a Duplicate.
 - 1. This Section will pull the data elements from the 'Permanency Plan Court Order Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Name
 - b. Court Ordered Date
 - c. Effective Date
 - 2. The field "Name" will have a hyperlink that will take the user to the 'Permanency Plan Court Order List' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. This section is dynamic based on if the Duplicate Person is associated to an unresolved Court Order when being marked as a Duplicate.
- x. The "Absent/Unmarried Parent(s)" section will display records from the "Absent/Unmarried Parent List", which can include the primary duplicate person.
 - 1. This Section will pull the data elements from the 'Support Questionnaire' page to the following fields for each record shown in Figure 2.2.2.3:
 - a. Name
 - b. SSN
 - c. DOB (Date of Birth)
 - d. Address
 - 2. The "Name" field will have a hyperlink will take the user to the 'Support Questionnaire' page of the person record that is being selected if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. Make the "Absent/Unmarried Parent(s)" section collapsible.
 - a. The section will be collapsed by default.

4. This section is dynamic based on if the Duplicate Person is associated to an absent/unmarried parent when being marked as a Duplicate.
- xi. The "Self-Service Portal" section will display a reminder message to the worker, shown in Figure 2.2.2.3.
 1. The section will display the message: "Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account."
 2. This section is dynamic based on if the Duplicate Person has a Self-Service Portal linked account.
 3. This section will still display even after the Golden Record has been relinked to their Self-Service Portal Account.
 - xii. Add a "Change History" section, that records information on the user who made the change, what time it was changed to, and comments on why the "Status" field of the record was changed, as shown in Figure 2.2.2.8 and Figure 2.2.2.9.
 1. The "Change History" record will only be generated when a user has changed the "Status" field to a different value and saves from 'Edit' mode.
 2. The "Staff Name" and "Staff ID" fields will pull the name and the staff ID of the worker from the staff that made the change.
 - a. The Staff ID will link to the worker's Worker Detail page.
 3. The "Date Time Stamped" field will generate the date and time when a user makes a change in 'Edit' mode and saved on the "County Duplicate Impact Detail" page.
 - a. These instances of "History Details" will be sorted descending based off the most recent change.
 4. The "Status Changed" field will display the new value of the "Status" field.
 5. The "Comments:" field in the View mode will display what was written in the "Comments" section from the Edit mode of the "County Impact Duplicate Detail" page.
 6. Make the "Change Information" section collapsible.
 - a. The section will be collapsed by default.
 - xiii. The "Edit" Button will allow the user to go into the 'Edit' mode of the Impact page.

1. If the user does not have the "CountyDuplicateImpactDetailEdit" Security Right, they will not see the 'Edit' button or be able to access the 'Edit' mode for the page. See Section 2.2.5 for more information.
- xiv. The "Close" Button will take the user to 'Impact List' page.
- b. The 'Edit' mode of this page is accessed through the "Edit" buttons on the "County Duplicate Impact List" and "County Duplicate Impact Detail" pages.
 - i. The "General Duplication Information" section will display the same information as the 'View' mode except for the "Status" field, where it will be a required dropdown field.
 1. The dropdown will display the following options:
 - a. New
 - b. In-Process
 - c. Completed
 - ii. Add "Comments" section with a text-area field to the Edit mode that will require users to provide more information as to the decision to adjust the information.
 1. If the "Status" value is changed to a different value from its previous value, this field will be required.
 2. This field will dynamically hide by default and will dynamically appear when the "Status" dropdown has been changed to a different value than the old value.
 3. Display a validation message when the user clicks on the "Save" button when the text-area field has more than 2000 characters.
 - a. The validation will display the following message: "Comments – [Text2000] Value is too long [Max. length: 2000.0]".
 4. Display a validation message when the user clicks on the "Save" button when the text-area field has 0 characters.
 - a. The validation will display the following message: "Comments – Field is required. Please enter a value."
 - iii. Additional sections will display the same information as the 'View' mode with no editable options to the fields.
 1. Checkboxes will appear to the right side of "Reviewed:" for each section (besides the "Comments" text-area field) when in 'Edit' mode, with the words "Reviewed:" to indicate users if a section has been looked at by a user, as shown in Figure 2.2.2.5, Figure 2.2.2.6, and Figure 2.2.2.7.

- a. These checkboxes will not change any values and will only be used for visual and informational tracking assistance.
- iv. The "Save" Button will save the changes made in 'Edit' mode to 'View' mode and check for validations, if applicable.
- v. The "Cancel" Button will take the user back to the 'View' mode of the page and will not save any changes made in 'Edit' mode.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** County Duplicate Impact (This will only appear if the user has the new Security Right 'CountyDuplicateImpactView')

2.2.5 Security Updates

Adding new Security Rights and Security Groups for the new 'County Duplicate Impact List' and 'County Duplicate Impact Detail' pages.

1. Security Rights

| Security Right | Right Description | Right to Group Mapping |
|---------------------------------|---|---|
| CountyDuplicateImpactView | View county duplicate impact person(s) list and detail pages for impacted person record(s). | County Duplicate Impact View, County Duplicate Impact Detail Edit |
| CountyDuplicateImpactDetailEdit | Identify and update status of impacted duplicate person(s) records from the list page. | County Duplicate Impact Detail Edit |

2. Security Groups

| Security Group | Group Description | Group to Role Mapping |
|-------------------------------------|---|----------------------------------|
| County Duplicate Impact View | View county duplicate impact person(s) list and detail. | View Only |
| County Duplicate Impact Detail Edit | Edit county duplicate impact person(s) detail status and make comments. | (County Determines Role Mapping) |

2.2.6 Page Mapping

Create the Page Mapping for the new page.

2.2.7 Accessibility

This page will be created to meet the Accessibility requirements and standards.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Create new batch to populate County Duplicate Impact Detail.

2.3.1 Overview

Create a new batch job to populate the new County Duplicate Impact Detail.

2.3.2 Description of Change

Create a batch job to populate the following sections on the County Duplicate Impact List and County Duplicate Impact Detail page.

County Duplicate List record:

1. First Name
2. Middle Name
3. Last Name
4. CIN
5. Status - 'New'
6. Created On – Batch Run Date

County Duplicate Detail record:

1. General Duplicate information
2. Programs
3. Golden Record
4. EBT
5. Recovery Account
6. Time Limit Summary Links
7. IPV
8. Absent/Unmarried Parent
9. Self-Service Portal

The record will be created when worker creates a record on the Duplicate Person List page. The batch will trigger when the Duplicate Person List when the Duplicate Person record Created On is between the Last Success Date and Batch Run Date or when the Duplicate Person record is linked to another person between the Last Success Date and Batch Run Date.

Note: If the worker unduplicated the record before the nightly batch run, the Batch will not create a record.

The batch will create a County Duplicate Impact Detail for all the cases that the Duplicate person is associated to.

Example 1, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Then the worker unduplicated the person A at 2pm on the same day. The batch will not create a record on the County Duplicate Impact List page for person A.

Example 2, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. There will be 2 records: 1 for County 18 and 1 for County 19.

Example 3, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. Person is only active on County 19 case. Person is discontinued or not in any program on County 18 case. There will be 2 records: 1 for County 18 and 1 for County 19.

Example 4, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. Person is Out of Home on County 18 case. There will be 2 records: 1 for County 18 and 1 for County 19.

The status of the County Duplicate Impact record will be 'New'.

The information on the County Duplicate Impact Detail page will not be changed by the batch job after the record creation date.

The batch will delete the County Duplicate Impact record that is in Complete status only after one year. The one year will be calculated from the date that the record is marked Complete. When a record is changed from Complete to other status, and then back to Complete. The batch will calculate one year from the latest Complete status.

2.3.3 Execution Frequency

Daily (Mon-Sat) except Holidays.

2.3.4 Key Scheduling Dependencies

N/A.

2.3.5 Counties Impacted

All counties.

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

N/A

2.3.8 Failure Procedure/Operational Instructions

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

2.4 Automated Regression Test

2.4.1 Overview

Create automated regression test scripts to verify the navigation path to the County Duplicate Impact List page, the search field validations on the County Duplicate Impact List page, and page mapping entries for the County Duplicate Impact List and County Duplicate Impact Detail pages.

Note: The functionality of the County Duplicate Impact Detail page is out of scope due to the dependency on either (1) pre-existing data that will not be present at the time of implementation or (2) data created via batch job execution in the test environment.

2.4.2 Description of Changes

1. Create a regression script to verify the navigation flow to the County Duplicate Impact List page.
2. Create regression scripts to verify the following page validations display when applicable on the County Duplicate Impact List page:
 - a. "From" date is not populated.
 - b. "To" date is not populated.
 - c. "From" / "To" date range is greater than 60 days.
 - d. "From" date is greater than the "To" date.
3. Create regression scripts to verify that a page mapping entry exists for each applicable field on the following pages:
 - a. County Duplicate Impact Detail
 - b. County Duplicate Impact List

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|---|-------------------------------|
| 1 | Security | Security Matrix for the new Security Rights and Security Groups | CA-272652 Security Matrix.xls |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|------------------------|---|---|
| 2.2.3.5 CAR- 485 | The LRS shall provide a method for directly alerting a COUNTY-specified employee other than the worker when a community/client representative for a client makes contact with a Local Office Site. For example, the COUNTY may wish to have the Deputy District Director notified directly, if a community representative (such as one from a legal aid office) visits a Local Office Site. | The County Duplicate Impact pages notify COUNTY-specific employees when a change has been made to a duplicate person in their county. |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-273505

Update the M44-211D to the latest State version

| | | |
|----------------|----------------------------------|------------------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Mohammad Dabbagh |
| | Reviewed By | Tiffany Huckaby |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|--|------------------|
| 02/01/2024 | 1.0 | Initial Design Setup | Mohammad Dabbagh |
| 08/21/2024 | 2.0 | Availability of existing and updated Threshold Languages and Correction to updated verbiage of A825 fragment | Mohammad Dabbagh |
| 09/10/2024 | 3.0 | Changes to no longer require the translation to the NOA title to Spanish and errors in some of threshold languages verbiage and the update in the message fragment used in these NOAs generation | Mohammad Dabbagh |
| | | | |
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1 OVERVIEW

This SCR is to update the verbiage of the CalSAWS versions of M44-211D NOAs to match the latest 9/23 State version.

1.1 Current Design

ACL 23-83 updated the M44-211D with new verbiage based on updated policy.

1.2 Requests

Update the CalSAWS versions of the M44-211D reason verbiage to match the latest 09/23 State version.

1.3 Overview of Recommendations

1. Update the verbiage of CalWORKs Denial NOA Reason Fragment A822 and update the message fragment to match the verbiage used in the latest state version of M44-211D.
2. Update the verbiage of CalWORKs Denial NOA Reason Fragment A825 and update the message fragment to match the verbiage used in the latest state version of M44-211D.
3. Update the verbiage of CalWORKs Denial NOA Reason Fragment A835 and update the message fragment to match the verbiage used in the latest state version of M44-211D.
4. Update the verbiage of CalWORKs Denial NOA Reason Fragment A847 and update the message fragment to match the verbiage used in the latest state version of M44-211D.
5. Add threshold verbiage to CalWORKs NA 290 Message fragment to match the state version.

1.4 Assumptions

1. There are no other changes to this notice unless otherwise specified in the Recommendations.

2 RECOMMENDATIONS

2.1 Update CalWORKs HA Denial NOA Reason Code A822-Deny HA No 12-Month Exception

2.1.1 Overview

The effort is updating the CW_DN_NO_HMELESS_EXPTN_FOUND_A822 with the latest state version. This notice is currently sent at denial for Temporary Homeless Assistance when not meeting an exception and received Homeless Assistance in the past 12-months.

Reason Fragment Name and ID: CW_DN_NO_HMELESS_EXPTN_FOUND_A822
(Fragment ID: 6171)

State Form/NOA: M44-211D (11/17) DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

Current NOA Template: NA 290

Current Program(s): CalWORKs

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

Existing Languages: English, Spanish, Chinese, Vietnamese

2.1.2 NOA Verbiage

Update Fragment XDP

Updated Languages: English, Spanish, Chinese, Vietnamese, Arabic, Farsi

NOA Mockups/Examples: See Supporting Documents #1

| Description | Existing Text | Updated Text | Formatting* |
|-------------|--|--|----------------|
| Static | You can get homeless assistance only once every 12 months unless you meet an exception. There is no proof that your homelessness was caused by one of the following 12 month exceptions: - domestic violence | You did not provide required verification that your homelessness was caused by one of the following 12-month exceptions: - State or Federally Declared Disaster - Domestic abuse - Uninhabitability - Mental or physical illness | Arial, Size 10 |

| | | | |
|--|---|--|--|
| | <ul style="list-style-type: none"> - place not liveable - medical illness - natural disaster | | |
|--|---|--|--|

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

2.1.3 NOA Variable Population

Update NOA Title and Footer Reference for new Reason for CalWORKs

The following are the references that will be included for the new Denial of Temporary Homeless Assistance Reason Fragment when generated for CalWORKs.

NOA Reference on Document List Page: NO EXCPT HA ONCE LIFETIME RULE

NOA Title: NOTICE OF ACTION CALWORKS DENIAL

NOA Footer: M44-211D (9/23) / NA 290 DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

NOA Footer Requires Translations: No

2.1.4 NOA Generation Conditions

Updates to Fragment Generation

Message Fragment:

| | |
|----------------------------------|---------------------------------------|
| Existing Message Fragment | CW_DN_MESSAGE2 (Fragment ID: 5020) |
| Updated Message Fragment | CW_RC_TN_MESSAGE1 (Fragment ID: 5107) |

Updates to Regulation

Existing Regulation: EAS 44-211.5

Updated Regulation: MPP 44-211.5

2.2 Update CalWORKs Temporary HA Denial NOA Reason Code A825 - Homeless Criteria Not Met

2.2.1 Overview

The effort is updating the CW_DN_HMELSS_CRIT_NOT_MET_A825 with the latest state version. This notice is currently sent at denial for Temporary Homeless Assistance when verification is not provided and not meeting any of the conditions of Homelessness.

Reason Fragment Name and ID: CW_DN_HMELSS_CRIT_NOT_MET_A825
(Fragment ID: 6172)

State NOA: M44-211D (10/21) DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

Current NOA Template: NA 290

Current Program(s): CalWORKs

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

Existing Languages: English, Spanish, Chinese, Vietnamese, Farsi

2.2.2 NOA Verbiage

Update Fragment XDP

Updated Languages: English, Spanish, Chinese, Vietnamese, Arabic, Farsi

NOA Mockups/Examples: See Supporting Documents #2

| Description | Existing Text | Updated Text | Formatting* |
|-------------|--|--|----------------|
| Static | <p>You did not verify on the Homeless Assistance request form (CW 42) that you are homeless.</p> <p>To get homeless assistance, you must give a sworn statement that verifies you are homeless by meeting one of these rules:</p> <p>You do not have your fixed and regular residence to stay at night,</p> <p>OR You are staying at night in a shelter that is temporary,</p> <p>OR The place you are living in a place that is not ordinarily used for sleeping,</p> | <p>You did not verify on the Homeless Assistance request form (CW 42) that you are homeless.</p> <p>To get homeless assistance, you must give a sworn statement that verifies you are homeless by meeting one of these rules:</p> <p>You do not have a fixed and regular residence to stay at night,</p> <p>OR You are staying at night in a shelter that is temporary,</p> <p>OR The place you are living is not ordinarily used for sleeping,</p> <p>OR You have gotten a notice that could lead to eviction</p> <p>OR You are a CalWORKs applicant or recipient fleeing domestic abuse.</p> | Arial, Size 10 |

| | | | |
|--|--|--|--|
| | OR You have received a notice to pay rent or quit, OR You are a CalWORKs applicant or recipient and you are fleeing domestic abuse. | | |
|--|--|--|--|

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

2.2.3 NOA Variable Population

Update NOA Title and Footer Reference for new Reason for CalWORKs

The following are the references that will be included for the new Denial of Temporary Homeless Assistance Reason Fragment when generated for CalWORKs.

NOA Reference on Document List Page: HOMELESS CRITERIA NOT MET

NOA Title: NOTICE OF ACTION CALWORKS DENIAL

NOA Footer: M44-211D (9/23) / NA 290 DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

NOA Footer Requires Translations: No

2.2.4 NOA Generation Conditions

Updates to Fragment Generation

Message Fragment:

| | |
|----------------------------------|---------------------------------------|
| Existing Message Fragment | CW_DN_MESSAGE2 (Fragment ID: 5020) |
| Updated Message Fragment | CW_RC_TN_MESSAGE1 (Fragment ID: 5107) |

Updates to Regulation

Existing Regulation: EAS 44-211.5

Updated Regulation: MPP 44-211.5

2.3 Update CalWORKs Permanent HA Denial NOA Reason code A835 - Homeless Standard Not Met

2.3.1 Overview

The effort is updating the CW_DN_HMELSS_STND_NOTMET_A835 with the latest state version. This notice is currently sent at denial for Permanent Homeless Assistance when not meeting any of the conditions of Homelessness.

Reason Fragment Name and ID: CW_DN_HMELSS_STND_NOTMET_A835

(Fragment ID: 6177)

State NOA: M44-211D (11/17) DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

Current NOA Template: NA 290

Current Program(s): CalWORKs

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.3.2 NOA Verbiage

Update Fragment XDP

Updated Languages: English, Spanish, Chinese, Vietnamese, Arabic, Farsi

NOA Mockups/Examples: See Supporting Documents #3

| Description | Existing Text | Updated Text | Formatting* |
|-------------|---|--|----------------|
| Static | <p>You are not homeless.</p> <p>To get homeless aid, you must meet one of these rules:</p> <p>You do not have your own place to stay at night.</p> <p>Or you are staying at night in a shelter that is temporary.</p> | <p>You did not verify on the Homeless Assistance request form (CW 42) that you are homeless.</p> <p>To get homeless assistance, you must give a sworn statement that verifies you are homeless by meeting one of these rules:</p> <p>You do not have a fixed and regular residence to stay at night,</p> | Arial, Size 10 |

| | | | |
|--|---|---|--|
| | <p>Or the place that you are in is a place that people do not usually live.</p> <p>Or you have not received a notice to pay rent or quit.</p> | <p>OR You are staying at night in a shelter that is temporary,</p> <p>OR The place you are living is not ordinarily used for sleeping,</p> <p>OR You have gotten a notice that could lead to eviction</p> <p>OR You are a CalWORKs applicant or recipient fleeing domestic abuse.</p> | |
|--|---|---|--|

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

2.3.3 NOA Variable Population

Update NOA Title and Footer Reference for new Reason for CalWORKs

The following are the references that will be included for the new Denial of Permanent Homeless Assistance Reason Fragment when generated for CalWORKs.

NOA Reference on Document List Page: HOMELESS CRITERIA NOT MET

NOA Title: NOTICE OF ACTION CALWORKS DENIAL

NOA Footer: M44-211D (9/23) / NA 290 DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

NOA Footer Requires Translations: No

2.3.4 NOA Generation Conditions

Updates to Fragment Generation

Message Fragment:

| | |
|----------------------------------|---------------------------------------|
| Existing Message Fragment | CW_DN_MESSAGE2 (Fragment ID: 5020) |
| Updated Message Fragment | CW_RC_TN_MESSAGE1 (Fragment ID: 5107) |

Updates to Regulation

Existing Regulation: EAS 44-211.5

Updated Regulation: MPP 44-211.5

2.4 Update CalWORKs HA Denial NOA Reason Code A847 Not Eligible for CalWORKs

2.4.1 Overview

The effort is updating the CW_DN_FAIL_HA_NOT_ELIG_CW_A847 to the latest state version. This notice is currently sent at denial for Permanent and Temporary Homeless Assistance when not receiving cash aid.

Reason Fragment Name and ID: CW_DN_FAIL_HA_NOT_ELIG_CW_A847
(Fragment ID: 6397)

State NOA: M44-211D (11/17) DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

Current NOA Template: NA 290

Current Program(s): CalWORKs

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.4.2 NOA Verbiage

Update Fragment XDP

Updated Languages: English, Spanish, Chinese, Vietnamese, Arabic, Farsi

NOA Mockups/Examples: See Supporting Documents #4

| Description | Existing Text | Updated Text | Formatting* |
|-------------|--|---|----------------|
| Static | You cannot get homeless assistance because you are not getting cash aid. | You cannot get homeless assistance because you are not getting CalWORKs or did not appear eligible for CalWORKs when you applied on <DateofHAApplication> | Arial, Size 10 |

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

2.4.3 NOA Variable Population

Add new Not Eligible for Homeless Assistance Fragment Variable Population

Add new variable population for Not Eligible for Homeless Assistance Fragment.

| Variable Name | Population | Formatting* |
|---------------------|---|--|
| DateofHAApplication | Populate with the date when the application for homeless assistance was filed by the program person. From Table: PGM_APP Column: APP_DATE | Arial Font Size 10 For example, "05/13/2024". |

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

Update NOA Title and Footer Reference for new Reason for CalWORKs

The following are the references that will be included for the new Denial of Temporary Homeless Assistance Reason Fragment when generated for CalWORKs.

NOA Reference on Document List Page: MUST BE ELIGIBLE FOR CALWORKS

NOA Title: NOTICE OF ACTION CALWORKS DENIAL

NOA Footer: M44-211D (9/23) / NA 290 DENY - HOMELESS INELIGIBILITY - TEMPORARY SHELTER AND/OR PERMANENT HOUSING

NOA Footer Requires Translations: No

2.4.4 NOA Generation Conditions

Updates to Fragment Generation

Message Fragment:

| | |
|----------------------------------|---------------------------------------|
| Existing Message Fragment | CW_DN_MESSAGE2 (Fragment ID: 5020) |
| Updated Message Fragment | CW_RC_TN_MESSAGE1 (Fragment ID: 5107) |

Updates to Regulation

Existing Regulation: EAS 44-211.5

Updated Regulation: MPP 44-211.5

2.5 Add threshold verbiage to CalWORKs NA 290 Message fragment CW_RC_TN_MESSAGE1 based on State verbiage

2.5.1 Overview

Adding threshold versions of message fragment CW_RC_TN_MESSAGE1 that are not present.

Message Fragment Name and ID: CW_RC_TN_MESSAGE1 (Fragment ID: 5107)

State Form/NOA: NA 290

Current Program(s): CalWORKs

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Existing Languages: English, Spanish, Chinese, Russian

2.5.2 NOA Verbiage

Updated Languages: Vietnamese, Arabic, Farsi, Armenian, Cambodian, Hmong, Korean, Loa, Tagalog

Note: Threshold languages Armenian, Cambodian, Hmong, Korean, Loa and Tagalog message fragments don't have reason fragment associated with them and won't be testable in the system. Their associated reason fragments will be added when the reason threshold verbiages becomes available.

2.5.3 NOA Variable Population

Existing NOA variable population will not be updated with this effort.

2.5.4 NOA Generation Conditions

Existing NOA generation conditions will not be updated with this effort.

3 SUPPORTING DOCUMENTS

Note: All Dynamic NOA Examples are provided for a visual idea of positioning, population formatting, and possible surrounding Fragments. They may include test data (fake names, dates, etc.) for population that may not be true values in production (addresses, income limits, etc.) or Variable placeholders. Any SCRs that are in progress or being completed after the Examples were created are not included within the Examples. Any additional documents that should be included along with the mockups will be present upon generation.

| Number | Functional Area | Description | Attachment |
|--------|-----------------|---|---------------------------------|
| #1 | NOA | Updated CalWORKs Denial A822 Mockup PDF | CalWORKs Denial A822_Mockup.pdf |
| #2 | NOA | Updated CalWORKs Denial A825 Mockup PDF | CalWORKs Denial A825_Mockup.pdf |
| #3 | NOA | Updated CalWORKs Denial A835 Mockup PDF | CalWORKs Denial A835_Mockup.pdf |
| #4 | NOA | Updated CalWORKs Denial A847 Mockup PDF | CalWORKs Denial A847_Mockup.pdf |

4 REQUIREMENTS

4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|----------|--|--|
| CAR-1213 | CalSAWS shall use standard text for all notices, NOAs, forms, letters, stuffers, and flyers. | The form is using text that has been approved by the County. |

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-276128

Update the Property Limits for the Automated
Solution Counties

| | | |
|----------------|----------------------------------|-----------|
| CalSAWS | DOCUMENT APPROVAL HISTORY | |
| | Prepared By | Tom Lazio |
| | Reviewed By | |

| DATE | DOCUMENT VERSION | REVISION DESCRIPTION | AUTHOR |
|-------------|-------------------------|--|---------------|
| 04/11/2024 | 1.0 | Initial Draft | Tom Lazio |
| 07/19/2024 | 2.0 | Revised design based on R1 feedback | Tom Lazio |
| 07/22/2024 | 3.0 | Update to Tulare's 2HH Personal Property and Liquid Asset limit per County feedback | Tom Lazio |
| 08/14/2024 | 4.0 | Removed Vehicle Limit Changes for Alameda County as all vehicles are exempt from counting as resource. | Tom Lazio |
| 08/20/2024 | 5.0 | Updated Section 2.1.2.29 with appropriate County Code for Yolo '57'. | Tom Lazio |
| 10/15/2024 | 6.0 | Added Long Decode Name to the CTCR tables as a clarification to the design | Tom Lazio |
| | | | |
| | | | |
| | | | |

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1 OVERVIEW

This SCR will update GA/GR Automated Solution countable resource limits for requesting counties who provided resource limit values to CalSAWS.

1.1 Current Design

The GA/GR Automated Solution resource limits are incorrect for the counties listed in this SCR.

1.2 Requests

The GA/GR Automated Solution resource limits need to be updated for the counties listed below who provided resource limit values to CalSAWS:

- Alameda
- Contra Costa
- Orange
- Placer
- Sacramento
- San Diego
- San Francisco
- San Luis Obispo
- San Mateo
- Santa Barbara
- Santa Clara
- Santa Cruz
- Solano
- Sonoma
- Tulare
- Ventura
- Yolo

1.3 Overview of Recommendations

1. CTCRs to set the 'end date' for existing, incorrect Liquid Asset, Real Property, Vehicle Property, and Personal Property limits for the counties mentioned in Section 1.2 (Request).
2. CTCRs to add new Liquid Asset, Real Property, Vehicle Property, and Personal Property limits for the counties mentioned in Section 1.2 (Request).

1.4 Assumptions

1. No resource amount changes needed for Fresno County.
2. No resource amount changes needed for 1HH in San Mateo, Santa Cruz, Sonoma, and Ventura counties.
3. Logic updates using cumulative income totals will be implemented as part of future SCR CA-270919.

4. Alameda currently exempts all vehicles so there will be no change to Vehicle resource limits.
5. Update to the vehicle exemption logic will be implemented in future SCR CA-278842 for Solano County.

2 RECOMMENDATIONS

2.1 GA/GR Automated Solution Property and Resource Limit Updates

2.1.1 Overview

Apply CTCR to end date existing resource limit amounts and add new resource limit amounts for the amounts and counties mentioned in Section 2.1.2 below.

2.1.2 Description of Changes

1. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Alameda County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|---------------------|---------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| L7 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 01 | 1 | 0 | LA |
| 6A | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 01 | 1 | 0 | RP |

2. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Contra Costa County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|---------------------|---------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 7A | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 07 | 1 | 0 | RP |

3. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Placer County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 5N | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 31 | 1 | 1500 | VP |
| 1B | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 31 | 1 | 0 | RP |

4. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Sacramento County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|---------------------|---------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 2B | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 34 | 1 | 1000 | RP |

5. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for San Diego County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| X1 | Personal Property Limit | Personal Property Limit | 01/01/1000 | 12/31/9999 | 37 | 1 | 250 | PP |
| 7N | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 37 | 1 | 1500 | VP |

6. Set the End Date to **06/30/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for San Francisco County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 8N | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 38 | 2 | 9500 | VP |

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 9N | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 38 | 1 | 9501 | VP |
| 4B | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 38 | 1 | 0 | RP |

7. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for San Luis Obispo County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| M8 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 40 | 2 | 3000 | LA |
| M9 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 40 | 1 | 2000 | LA |
| X4 | Personal Property Limit | Personal Property Limit | 01/01/1000 | 12/31/9999 | 40 | 2 | 3000 | PP |
| X5 | Personal Property Limit | Personal Property Limit | 01/01/1000 | 12/31/9999 | 40 | 1 | 2000 | PP |
| 7B | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 40 | 1 | 0 | RP |
| 10 | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 40 | 2 | 9500 | VP |
| 20 | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 40 | 1 | 9501 | VP |

8. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Santa Barbara County:

| Code_Num _Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|----------------------|-------------------------------|-------------------------------|------------|-------------------|----------------|-------------------|-------------------|--|
| X7 | Personal Property Limit | Personal Property Limit | 01/01/1000 | 12/31/9999 | 42 | 1 | 500 | PP |

9. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Santa Clara County:

| Code_Num _Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|----------------------|---------------------------|---------------------------|------------|-------------------|----------------|-------------------|-------------------|--|
| 8B | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 43 | 1 | 99999 | RP |
| M5 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 43 | 1 | 0 | LA |

10. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Solano County:

| Code_Num _Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|----------------------|-------------------------------|-------------------------------|------------|-------------------|----------------|-------------------|-------------------|--|
| 1C | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 48 | 1 | 359 | RP |
| 7O | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 48 | 1 | 359 | VP |
| N4 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 48 | 1 | 0 | LA |
| Y1 | Personal Property Limit | Personal Property Limit | 01/01/1000 | 12/31/9999 | 48 | 1 | 359 | PP |

11. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Tulare County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 9O | Vehicle Property Limit | Vehicle Property Limit | 01/01/1000 | 12/31/9999 | 54 | 1 | 25483 | VP |
| N6 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 54 | 1 | 0 | LA |
| Y3 | Personal Property Limit | Personal Property Limit | 01/01/1000 | 12/31/9999 | 54 | 1 | 0 | PP |

12. Set the End Date to **08/31/2023** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Yolo County:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|---------------------|---------------------|------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 5C | Real Property Limit | Real Property Limit | 01/01/1000 | 12/31/9999 | 57 | 1 | 500 | RP |
| N8 | Liquid Asset | Liquid Asset | 01/01/1000 | 12/31/9999 | 57 | 1 | 0 | LA |

13. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Alameda County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| L7 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 01 | 1 | 1000 | LA |
| 6A | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 01 | 1 | 999999 | RP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 01 | 2 | 1000 | LA |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 01 | 2 | 1000 | PP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 01 | 2 | 999999 | RP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

14. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Contra Costa County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| 7A | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 07 | 1 | 500 | RP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 07 | 2 | 500 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 07 | 2 | 500 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 07 | 2 | 500 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 07 | 2 | 4500 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

15. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Orange County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 30 | 2 | 5000 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 30 | 2 | 1000 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 30 | 2 | 1000 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 30 | 2 | 4650 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

16. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Placer County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| 5N | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 31 | 1 | 75 | VP |
| 1B | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 31 | 1 | 75 | RP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 31 | 2 | 75 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 31 | 2 | 75 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 31 | 2 | 75 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 31 | 2 | 75 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

17. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Sacramento County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| 2B | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 34 | 1 | 0 | RP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 34 | 2 | 0 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 34 | 2 | 250 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 34 | 2 | 20 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 34 | 2 | 2000 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

18. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Diego County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| X1 | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 37 | 1 | 1500 | PP |
| 7N | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 37 | 1 | 4650 | VP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 37 | 2 | 0 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 37 | 2 | 1500 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 37 | 2 | 50 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 37 | 2 | 4650 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH

19. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Francisco County effective as of **dates** shown in the table below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|-------------------|-------------------|-------------|----------------|----------------|---------------------------------|
| 8N | Vehicle Property Limit | Vehicle Property Limit | 07/01/2023 | 06/30/2024 | 38 | 2 | 32045 | VP |
| 9N | Vehicle Property Limit | Vehicle Property Limit | 07/01/2023 | 06/30/2024 | 38 | 1 | 32045 | VP |
| 8N | Vehicle Property Limit | Vehicle Property Limit | 07/01/2024 | 12/31/9999 | 38 | 2 | 32968 | VP |
| 9N | Vehicle Property Limit | Vehicle Property Limit | 07/01/2024 | 12/31/9999 | 38 | 1 | 32968 | VP |
| 4B | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 38 | 1 | 2000 | RP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 38 | 2 | 3000 | RP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

20. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Luis Obispo County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| M8 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 40 | 2 | 1000 | LA |
| M9 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 40 | 1 | 1000 | LA |
| X4 | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 40 | 2 | 1000 | PP |
| X5 | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 40 | 1 | 1000 | PP |
| 7B | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 40 | 1 | 1000 | RP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 40 | 2 | 1000 | RP |
| 10 | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 40 | 2 | 1000 | VP |
| 20 | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 40 | 1 | 1000 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

21. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for San Mateo County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 41 | 2 | 1464 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 41 | 2 | 1464 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 41 | 2 | 1464 | LA |

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 41 | 2 | 1464 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

22. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Santa Barbara County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| X7 | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 42 | 1 | 50 | PP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 42 | 2 | 5000 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 42 | 2 | 50 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 42 | 2 | 50 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 42 | 2 | 1500 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

23. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Santa Clara County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|---------------------|---------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| 8B | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 43 | 1 | 500 | RP |
| M5 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 43 | 1 | 500 | LA |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 43 | 2 | 500 | RP |

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 43 | 2 | 500 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 43 | 2 | 500 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 43 | 2 | 4650 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

24. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Santa Cruz County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 44 | 2 | 25000 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 44 | 2 | 200 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 44 | 2 | 300 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 44 | 2 | 9300 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

25. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Solano County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| 1C | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 48 | 1 | 429 | RP |
| 7O | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 48 | 1 | 0 | VP |
| N4 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 48 | 1 | 429 | LA |

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| Y1 | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 48 | 1 | 429 | PP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 48 | 2 | 697 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 48 | 2 | 697 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 48 | 2 | 697 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 48 | 2 | 0 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

26. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Sonoma County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 49 | 2 | 500 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 49 | 2 | 500 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 49 | 2 | 50 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 49 | 2 | 2500 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

27. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Tulare County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|------------------------|------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| 90 | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 54 | 1 | 32968 | VP |
| N6 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 54 | 1 | 262 | LA |

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| Y3 | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 54 | 1 | 262 | PP |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 54 | 2 | 0 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 54 | 2 | 429 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 54 | 2 | 429 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 54 | 2 | 32968 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

28. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Ventura County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|------------|------------|-------------|----------------|----------------|---------------------------------|
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 56 | 2 | 1000 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 56 | 2 | 1000 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 56 | 2 | 100 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 56 | 2 | 1500 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

29. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Yolo County effective as of **09/01/2023** as shown below:

| Code_Num_Identif | Short Decode Name | Long Decode Name | Begin Date | End Date | County Code | Household Size | Resource Limit | GA GR Resource Limit Categories |
|------------------|-------------------------|-------------------------|-------------------|------------|-------------|----------------|----------------|---------------------------------|
| 5C | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 57 | 1 | 1000 | RP |
| N8 | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 57 | 1 | 1000 | LA |
| TBD* | Real Property Limit | Real Property Limit | 09/01/2023 | 12/31/9999 | 57 | 2 | 1000 | RP |
| TBD* | Personal Property Limit | Personal Property Limit | 09/01/2023 | 12/31/9999 | 57 | 2 | 1000 | PP |
| TBD* | Liquid Asset | Liquid Asset | 09/01/2023 | 12/31/9999 | 57 | 2 | 1000 | LA |
| TBD* | Vehicle Property Limit | Vehicle Property Limit | 09/01/2023 | 12/31/9999 | 57 | 2 | 4650 | VP |

TBD* - Code_Num_Identif to be determined in development as these will be new codes for 2HH.

2.1.3 Programs Impacted

GA/GR Automated Solution

3 REQUIREMENTS

3.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|----------|---|---|
| 2.8.2.11 | The LRS shall treat income and resources based on program-specific rules. | This SCR will update GA/GR Automated Solution resource limits based on county provided input. |