CalSAWS

California Statewide Automated Welfare System

Design Document

CA-219129

Update EBT Printer Detail to Require Physical Office ID

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Peter Shelley
	Reviewed By	John B., Matthew W., Jimmy Tu, Eric Wu., Sidhant G.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/10/2024	1.0	Initial Design	Peter Shelley
9/25/2024	1.1	Internal Review	Peter Shelley
10/17/2024	1.2	Internal Review	Peter Shelley
11/05/2024	1.3	1. Updated section 2.1.2 EBT Printer Search Mockup now includes a Search By Printer Location view, requiring an Office ID selection for the search (figure 2.1.2). 2. Added section 2.3 Automated Regression Test	Peter Shelley
11/05/2024	1.4	1. Updated section 2.2.2 EBT Printer Detail Mockup figure 2.2.1 to display 'Printer County' in top section. 2. Made changes identified by Denise Barajas	Peter Shelley
12/2/2024	1.5	Responded to region 6 questions/comments for clarification.	Peter Shelley
1/13/2025	1.6	Remove comments	Peter Shelley

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1 OVERVIEW

Consortium requests the physical office ID to be mandatory on the EBT Printer Search page. Additional information should be presented to more accurately identify printers for which the user is searching. Further, there needs to be security right changes to separate the View and Edit rights on the EBT Printer Search and Detail pages.

1.1 Current Design

Physical Office ID cannot be made mandatory on the EBT Printer Detail page until all offices for the 57 Migration Counties are available in the System. Physical Office ID is not a mandatory search field resulting in various unnecessary Printers displaying to the user when searching. When selecting a printer and navigating to EBT Printer Detail page, a set of offices are displayed. This format lacks clarity for users.

1.2 Requests

1. Update EBT Printer Search page to add Search By: Printer Location.
2. Update EBT Printer Search page to display the physical location of the printer in the Search Results Summary Office field.
3. Update the 'Remove' button on EBT Printer Search page to remove the printer from CalSAWS.
4. Create the new EBT Printer Special security group where users have the ability to edit all aspects of EBT printers.
5. Update EBT Printer security group to EBT Printer Edit, with fewer edit rights than EBT Printer Special, the new security group as mentioned with in 1.3 Over of Recommendations section, within #7.
6. Update EBT Printer Detail page to rename 'Search Results Summary' Section as 'Authorized Offices'.
7. Update EBT Printer Detail page to add a 'County' column to the 'Authorized Offices' section.
8. Update EBT Printer Detail page to rename 'County' field at the top to 'Printer County'

1.3 Overview of Recommendations

1. Update EBT Printer Search page to add the 'Printer Location' drop down option via the Search By method. (See Figures 2.1.1 and 2.1.2).
2. Update EBT Printer Search page to display the physical location of the printer in the Search Results Summary Printer Location field. (See Figure 2.1.3).
3. Update EBT Printer Search page Search By 'Office' method to search by 'Authorized Office'. (See Figure 2.1.1).
4. Update the 'Remove' button on EBT Printer Search page to remove the printer from CalSAWS.

5. Create new hard validation for when users attempt to remove printers outside their county. (See Figure 2.1.5).
6. Create new hard validation for when users attempt to remove printers with existing connections to authorized offices. (See Figure 2.1.5).
7. Create new security group EBT Printer Special to limit which users can add/remove printers from offices and edit printers' locations and counties. (See Figure 2.2.2).
8. Update EBT Printer Edit security group to limit users' ability to add/remove printers from offices and edit printers' locations and counties. (See Figure 2.2.4).
9. Update EBT Printer Detail page to rename 'Search Results Summary' Section as 'Authorized Offices'. (See Figure 2.2.1).
10. Update EBT Printer Detail page to add a 'County' column to the 'Authorized Offices' section. (See Figure 2.2.1).
11. Update EBT Printer Detail page to display 'Printer County' in top section to clarify for page mapping. (See Figure 2.2.1).

1.4 Assumptions

The remove button will be updated from current logic, which removes selected printer from logged-in user's office. This functionality will be maintained through EBT Printer Detail page. The term 'Authorized Office' is used to categorize all offices that can use a specific printer (ex: For printer 36PRINT006, Coachella Self Sufficiency office in Riverside can courtesy print and Barstow TAD/WTW/Child Care/PID in San Bernardino is the home office of the printer. Both are defined as Authorized Offices). The term 'Printer Location' is used to refer to the office where the printer physically sits (ex: the Printer Location for San Bernardino County-001 is SB TAD 01/WTW/Child Care/PID office).

2 RECOMMENDATIONS

2.1 EBT Printer Search

2.1.1 Overview

This page allows the worker to select printers from other offices/districts to be used for printing EBT cards/warrants. This page will be updated to include the option to search by printer location and update the office value in the search results to display the physical office name instead of the name of the most recently added office. The search by office will be renamed to search by authorized office. The ability to remove and add printers to a county will be restricted to a security right granted to few users. These restricted rights will be subject to new, additional validations.

2.1.2 EBT Printer Search Mockup

Figure 2.1.1 – EBT Printer Search – Search by Options

Figure 2.1.2 – EBT Printer Search – Search by Printer Location

Figure 2.1.3 – EBT Printer Search – Printer Location Column

EBT Printer Search

Search By: ✱
County ✔

County: ✱   **Printer ID:**   **Printer Name:**
San Bernardino ✔

Results per Page: 25 ✔   Search

		Search Results Summary		Results 1 - 25 of 36

1 2 Next

	Printer ID ▼	Printer Name ▽	Printer Location	
☐	36PRINT 001	San Bernardino County-001		Edit
☐	36PRINT001	San Bernardino County-001	SB TAD 01/WTW/Child Care/PID	Edit
☐	36PRINT002	San Bernardino County-002	SB TAD 02/WTW/Child Care/PID	Edit
☐	36PRINT003	San Bernardino County-003	Yucca Valley TAD/WTW/Child Care/PID	Edit
☐	36PRINT004	San Bernardino County-004	Redlands TAD/WTW/Child Care/WIA/FC/PID	Edit
☐	36PRINT006	San Bernardino County-006	Barstow TAD/WTW/Child Care/PID	Edit
☐	36PRINT007	San Bernardino County-007	SB TAD 07/WTW/Child Care/PID	Edit

Remove   Add

1 2 Next

Figure 2.1.4 – EBT Printer Search – EBTPrinterSpecial Group View

EBT Printer Search

- **Remove** - User is not located in county where printer is located.
- **Remove** - Ensure there are no offices associated with the printer to be removed.

Search

Search By: *
County ▼

County: *   **Printer ID:**   **Printer Name:**
San Bernardino ▼

Results per Page: 25 ▼   Search

Search Results Summary			**Results 1 - 25 of 36**

1 2 Next

☐	**Printer ID** ▼	**Printer Name** ▽	**Office**	
☐	36PRINT 001	San Bernardino County-001		Edit
☐	36PRINT001	San Bernardino County-001	SB TAD 01/WTW/Child Care/PID	Edit
☐	36PRINT002	San Bernardino County-002	SB TAD 02/WTW/Child Care/PID	Edit
☑	36PRINT003	San Bernardino County-003	Yucca Valley TAD/WTW/Child Care/PID	Edit
☐	36PRINT004	San Bernardino County-004	Banning Self Sufficiency	Edit
☐	36PRINT006	San Bernardino County-006	Barstow TAD/WTW/Child Care/PID	Edit
☐	36PRINT007	San Bernardino County-007	Hemet Self Sufficiency	Edit
☐	36PRINT0075	Ontario Medical		Edit
☐	36PRINT008	San Bernardino County-008	Hesperia TAD/WTW/Child Care/PID/Resource	Edit
☐	36PRINT009	San Bernardino County-009	Fontana TAD/WTW/Child Care/PID	Edit
☐	36PRINT075	San Bernardino County-075	Ontario TAD/Medi-Cal/PID	Edit

Remove   Add

1 2 Next

This Type 1 page took 0.71 seconds to load.

Figure 2.1.5 – EBT Printer Search – EBTPrinterSpecial Security Group Remove Validations

EBT Printer Search

Search

Search By: *

County ▾

County: *

San Bernardino ▾

Printer ID:

Printer Name:

Results per Page: 25 ▾   Search

Search Results Summary			Results 1 – 25 of 36

1 2 Next

Printer ID	Printer Name	Office	
36PRINT 001	San Bernardino County-001		Edit
36PRINT001	San Bernardino County-001	SB TAD 01/WTW/Child Care/PID	Edit
36PRINT002	San Bernardino County-002	SB TAD 02/WTW/Child Care/PID	Edit
36PRINT003	San Bernardino County-003	Yucca Valley TAD/WTW/Child Care/PID	Edit
36PRINT004	San Bernardino County-004	Banning Self Sufficiency	Edit
36PRINT006	San Bernardino County-006	Barstow TAD/WTW/Child Care/PID	Edit
36PRINT007	San Bernardino County-007	Hemet Self Sufficiency	Edit
36PRINT0075	Ontario Medical		Edit
36PRINT008	San Bernardino County-008	Hesperia TAD/WTW/Child Care/PID/Resource	Edit

1 2 Next

Figure 2.1.6 – EBT Printer Search – EBTPrinterEdit Group View

2.1.3 Description of Changes

1. Update EBT Printer Search page to add the ability to search by printer location. (See Figures 2.1.1)
2. Update Search By "Office" to Search By "Authorized Office". (See Figure 2.1.1)
3. Update EBT Printer Search page to display the Printer Location in the Search Results Summary Printer Location field. (See Figure 2.1.3)
4. Restrict add/remove printer functionality to users in EBTPrinterSpecial security group to eliminate inaccurate updates to printer statuses. (See Figures 2.1.4 and 2.1.6)
5. Add "User is not located in county where printer is located" validation (ex. Riverside employee attempts to remove a printer from San Bernardino). (See Figure 2.1.5).
6. Add "Ensure there are no offices associated with the printer to be removed" validation (ex. Riverside employee attempts to remove a

printer that San Bernardino office is authorized to use). (See Figure 2.1.5).

7. Update the 'Remove' button on EBT Printer Search page to remove the printer from CalSAWS (e.g. printer is decommissioned, this button would be used to remove it from the CalSAWS system databases entirely).

2.1.4 Page Location

- **Global:** Fiscal
- **Local:** EBT
- **Task:** EBT Printer Search

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EBTPrinterSearchEdit	Access to EBT Printer Search view/edit rights	EBT Printer Special
EBTPrinterDetailFullEdit	Access to EBT Printer Detail view/edit rights	EBT Printer Special
EBTPrinterDetailEdit AuthOffice	Access to EBT Printer Detail view and authorized office edit rights	EBT Printer Edit
EBTPrinterSearchView	Access to EBT Printer Search view rights	EBT Printer View
EBTPrinterDetailView	Access to EBT Printer Detail view rights	EBT Printer View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
EBT Printer Special	Access to EBT Printer Search view/edit rights and all EBT Printer Detail view/edit rights	
EBT Printer Edit	Access to EBT Printer Search view rights and EBT Printer Detail view and EBT Printer Detail	

Security Group	Group Description	Group to Role Mapping
	authorized office edit rights	
EBT Printer View	Access to view EBT Printer Search and EBT Printer Detail pages	

Security Group	Security Right
EBT Printer Special	**EBTPrinterDetailFullEdit - Edit printer office and/or county on EBT Printer Detail**
	EBTPrinterSearchEdit - Add/remove printers on EBT Printer Search
	EBTPrinterDetailEditAuthOffice - Add/remove authorized offices to printers on EBT Printer Detail
	EBTPrinterSearchView - View EBT Printer Search page
	EBTPrinterDetailView – View EBT Printer Detail page
EBT Printer Edit	EBTPrinterDetailEditAuthOffice - Add/remove authorized offices to printers on EBT Printer Detail
	EBTPrinterSearchView - View EBT Printer Search page
	EBTPrinterDetailView – View EBT Printer Detail page
EBT Printer View	EBTPrinterSearchView - View EBT Printer Search page
	EBTPrinterDetailView – View EBT Printer Detail page

2.1.6 Page Mapping

Update EBT Printer Search Page to include page mapping for the following:

a. Page: EBT Printer Search
b. Field: Printer Location
c. Table: OFFICE
d. Column: OFFICE_NAME.
e. Description: 'This column stores the NAME of the office where the printer is located.'

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

No Change.

2.2 EBT Printer Detail

2.2.1 Overview

This page allows the worker to edit printer information. This page will be updated to display 'Authorized Offices' instead of 'Search Results Summary' and incorporate the county of each listed Authorized Office. 'Physical Office ID' will be updated to display 'Printer Location' and be a mandatory field. 'Printer Location' field will be subject to a new validation ensuring the office is in the printer's county.

2.2.2 EBT Printer Detail Mockup

EBT Printer Detail

[Edit] [Close]

Printer ID:	**Printer Name:**
36PRINT001	San Bernardino County-001
Physical Office ID: *	**Printer County:** *
01	San Bernardino

Authorized Offices   Results 1 - 3 of 3

Office ID	Office Name	County
01	SB TAD 01/WTW/Child Care/PID	San Bernardino
29	La Sierra Self Sufficiency	Riverside
80	Jurupa Self Sufficiency	Riverside

[Edit] [Close]

Figure 2.2.1 – EBT Printer Detail – Authorized Offices

EBT Printer Detail

Save **Cancel**

Printer ID:
36PRINT001

Printer Name:
San Bernardino County-001

Printer Location: ✱
01 **Remove**

County: ✱
San Bernardino ▾

Authorized Offices   Results 1 – 4 of 4

☐	Office ID ▼	Office Name ▽	County
☐	01	SB TAD 01/WTW/Child Care/PID	San Bernardino
☐	29	La Sierra Self Sufficiency	Riverside
☐	35	Hemet Self Sufficiency	Riverside
☐	80	Jurupa Self Sufficiency	Riverside

Remove   **Add**

Save **Cancel**

Figure 2.2.2 – EBT Printer Detail – EBTPrinterSpecial Group View

EBT Printer Detail

✱- Indicates required fields

- **Printer Location** - Printer Location must be in same county as office.

Save **Cancel**

Printer ID:
36PRINT001

Printer Name:
San Bernardino County-001

Printer Location: ✱
35 **Remove**

County: ✱
San Bernardino ▾

Authorized Offices   Results 1 – 4 of 4

☐	Office ID ▼	Office Name ▽	County
☐	01	SB TAD 01/WTW/Child Care/PID	San Bernardino
☐	29	La Sierra Self Sufficiency	Riverside
☐	35	Hemet Self Sufficiency	Riverside
☐	80	Jurupa Self Sufficiency	Riverside

Remove   **Add**

Save **Cancel**

Figure 2.2.3 – EBT Printer Detail – Edited Printer Location Validation

EBT Printer Detail

Save   Cancel

Printer ID:
36PRINT001

Printer Name:
San Bernardino County-001

Printer Location: *
01

County: *
San Bernardino

	Office ID	**Office Name**	**County**
Authorized Offices			**Results 1 – 4 of 4**
☐	01	SB TAD 01/WTW/Child Care/PID	San Bernardino
☐	29	La Sierra Self Sufficiency	Riverside
☐	35	Hemet Self Sufficiency	Riverside
☐	80	Jurupa Self Sufficiency	Riverside

Remove   Add

Save   Cancel

Figure 2.2.4 – EBT Printer Detail – EBTPrinterEdit Group View

2.2.3 Description of Changes

1. Rename 'Search Results Summary' section to 'Authorized Offices'. (See Figure 2.2.1)
2. Update EBT Printer Detail page to add a 'County' column to the 'Authorized Offices' section to indicate county of authorized office. (See Figure 2.2.1)
3. Rename 'Physical Office ID' to 'Printer Location'. (See Figure 2.2.1)
4. Update Printer Location to be a required field. (See Figure 2.2.1)
5. Update Printer Location and printer County to be edited only by those with EBTPrinterSpecial security right. (See Figure 2.2.2)
6. Display validation "Printer Location – Selected office must be in same county as printer" when user sets printer location to an office outside of printer's county. (See Figure 2.2.3)
7. Remove Printer Location and Printer County edit ability for users without EBTPrinterSpecial. (See Figure 2.2.4)

2.2.4 Page Location

- **Global:** Fiscal
- **Local:** EBT
- **Task:** EBT Printer Detail

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EBTPrinterSearchEdit	Access to EBT Printer Search view/edit rights	EBT Printer Special
EBTPrinterDetailEdit	Access to EBT Printer Detail view/edit rights	EBT Printer Special
EBTPrinterDetailEdit AuthOffice	Access to EBT Printer Detail view and authorized office edit rights	EBT Printer Edit
EBTPrinterSearchView	Access to EBT Printer Search view rights	EBT Printer View
EBTPrinterDetailView	Access to EBT Printer Detail view rights	EBT Printer View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
EBT Printer Special	Access to EBT Printer Search view/edit rights and all EBT Printer Detail view/edit rights	
EBT Printer Edit	Access to EBT Printer Search view rights and EBT Printer Detail view and EBT Printer Detail authorized office edit rights	
EBT Printer View	Access to view EBT Printer Search and EBT Printer Detail pages	

2.2.6 Page Mapping

Update EBT Printer Detail page to include mapping for the following:

    a. Page: EBT Printer Detail
    b. Field: County

c. Table: OFFICE
d. Column: COUNTY_CODE
e. Description: 'This column stores the COUNTY of the associated authorized office in the Authorized Office list.'

2.2.7 Accessibility

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

2.2.8 Page Usage/Data Volume Impacts

No Change.

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify that 'Authorized Offices' and 'Printer Location' are available Search By options on the EBT Printer Search page, and that a 'Printer Location' column displays in the search results on this page.

Create new automated regression test scripts to verify that the 'Printer Location' field displays below the 'Printer ID', and the office list is titled 'Authorized Offices' on the EBT Printer Detail page.

2.3.2 Description of Changes

1. Create regression scripts to verify the following on the EBT Printer Search page:
   a. The following options are available in the Search By drop list:
       i. Authorized Offices
       ii. Printer Location
   b. A 'Printer Location' column displays in the search results table.
   Technical Note: The search result content is outside the scope of this test.
2. Create regression scripts to verify the following on the EBT Printer Detail page:
   a. Printer Location displays below the Printer ID (as shown in section 2.2 above).
   b. A section titled 'Authorized Offices' displays below the Printer Location and County values.
   Technical Note: The table cell content of this section is outside the scope of this test.
3. Create regression scripts to verify that a page mapping entry exists for each applicable field on the following pages:
   a. EBT Printer Detail
   b. EBT Printer Search

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.	This requirement is met by allowing users to add/remove/edit EBT Printers to issue benefits.

5   OUTREACH

N/A.

6   APPENDIX

N/A.

CalSAWS

California Statewide Automated Welfare System

Design

CA-224153

Update NOA Suppression logic for Multi-Month EDBC for CalFresh

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Brendan Mandyam	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
12/10/2024	1.0	Initial Design	Brendan Mandyam

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CA-224153 – Update NOA Suppression logic for Multi-Month EDBC for CalFresh

1 OVERVIEW

When a multi-month EDBC is run not all NOAs are generated and sent out. There is logic preventing duplicate NOAs from being generated, however if the same NOA reason is applicable for more than one month that NOA will be suppressed

1.1 Current Design

1. When the same NOA reason is applicable for more than one month, that NOA will be suppressed due to logic preventing duplicate NOAs from generating during a multi-month EDBC
2. SAR 2, AR 2, and AR2SAR forms are triggered from EDBC and generating once in multi month scenarios

For Example:

If a multi-month EDBC is run for February and March and there is a change in benefits for both February and March, only the NOA for the change in February's benefits will generate. If instead February and March were run in single month run EDBCs the same scenario would generate two NOAs (one for February and one for March).

Multi-month EDBC scenario:

Run EDBC for February and March.

Run EDBC

		Change Reason	Run EDBC	Cancel

✷- Indicates required fields

Benefit Processing Range:

Begin Month: ✷   **End Month:** ✷

02/2022 ⌄   03/2022 ⌄

☐	Program	Status	Timely Notice Exception	Reason	Run Reason
☑	CalFresh	Active	No ⌄		

		Change Reason	Run EDBC	Cancel

Accept both Month EDBCs. Note, there is a change for both months.

EDBC List

| | | | Preview NOAs | Save and Continue | Cancel |

- **CalFresh NOA run is complete – NOA generated**

Display by:

Program:	Type Reason:	Run Status:	From:	To:	
[▾]	[▾]	[▾]	01/2022	03/2022	View

Search Results Summary   Results 1 - 3 of 3

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
▾	▾	▾	▾	▾	▾	▾	▾
01/2022		CalFresh	Regular	Accepted - Saved	459.00	08/22/2022	Online EDBC Rules
02/2022	02/2022	CalFresh	Regular	Accepted - Not Saved	368.00	08/22/2022	Online EDBC Rules
03/2022		CalFresh	Regular	Accepted - Not Saved	320.00	08/22/2022	Online EDBC Rules

| | | Preview NOAs | Save and Continue | Cancel |

View Notices of Actions generated. Note, only one is listed in Distributed Documents.

Distributed Documents Search

✱- Indicates required fields   Images

▸ Refine Your Search

Back to EDBC List page

Search Results Summary   Results 1 - 1 of 1

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal	
▾	▾	▾	▾	▾	▾	
08/22/2022 2:12 PM	NOA - CF - BC - CNTBL INCOME INCREASED		CalFresh	Preview		Details

Images

View the NOA. Note, there is only the NOA for February. March is missing.

EDBCs run individually scenario:
Run EDBC for February.

Run EDBC

✱ - Indicates required fields   [Change Reason] [Run EDBC] [Cancel]

Benefit Processing Range:

Begin Month: ✱   **End Month:** ✱

`02/2022 ⌄`   `02/2022 ⌄`

☐	Program	Status	Timely Notice Exception	Reason	Run Reason
☑	CalFresh	Active	`No ⌄`		

[Change Reason] [Run EDBC] [Cancel]

Accept and save the change in Benefits for February.

EDBC List

[Preview NOAs] [Save and Continue] [Cancel]

- **CalFresh NOA run is complete – NOA generated**

Display by:

Program: **Type Reason:**   **Run Status:**   **From:**   **To:**

`⌄`   `⌄`   `⌄`   `01/2022`   `02/2022`   [View]

Search Results Summary   Results 1 - 2 of 2

Begin Month ▽	End Month ▽	Program ▽	Type ▽	Run Status ▽	Auth Amount ▽	Date Run ▽	EDBC Source ▽
01/2022		CalFresh	Regular	Accepted - Saved	459.00	08/22/2022	Online EDBC Rules
02/2022		CalFresh	Regular	Accepted - Not Saved	368.00	08/22/2022	Online EDBC Rules

[Preview NOAs] [Save and Continue] [Cancel]

Run EDBC for March

Run EDBC

✱ - Indicates required fields   [Change Reason] [Run EDBC] [Cancel]

Benefit Processing Range:

Begin Month: ✱   **End Month:** ✱

`03/2022 ⌄`   `03/2022 ⌄`

☐	Program	Status	Timely Notice Exception	Reason	Run Reason
☑	CalFresh	Active	`No ⌄`		

[Change Reason] [Run EDBC] [Cancel]

Accept and save the change in Benefits for March.

EDBC List

	Preview NOAs	Save and Continue	Cancel

- **CalFresh NOA run is complete – NOA generated**

Display by:

Program:		Type Reason:	Run Status:	From:	To:	
				02/2022	03/2022	View

Search Results Summary								Results 1 - 2 of 2

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
02/2022		CalFresh	Regular	Accepted - Saved	368.00	08/22/2022	Online EDBC Rules
03/2022		CalFresh	Regular	Accepted - Not Saved	320.00	08/22/2022	Online EDBC Rules

	Preview NOAs	Save and Continue	Cancel

View Notices of Actions generated. Note, two are listed in Distributed Documents.

Distributed Documents Search

* - Indicates required fields

Images

▸ Refine Your Search

Search Results Summary						Results 1 - 4 of 4

☐	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
	08/22/2022 2:30 PM	NOA - CF - BC - CNTBL INCOME INCREASED		CalFresh	Pending Review	Details
	08/22/2022 2:21 PM	NOA - CF - BC - CNTBL INCOME INCREASED		CalFresh	Pending Review	Details

View the NOAs. Note, there are two NOAs, one for February and one for March.

1.2 Requests

1. Update NOA logic suppression for multi-month EDBC to send out NOAs when there has been a change to the benefit amount and other values of interest.
2. Update SAR2, AR2, and AR2SAR to send when applicable during the multi month scenario

1.3 Overview of Recommendations

All updates will be made only for the CalFresh Program

1. Add logic to enable month-month comparison inside of a Multi-Month EDBC Run.
2. Add logic to generate a single Supplemental NOA for the entire Multi-Month EDBC run containing all Supplemental benefits issued during the Multi-Month EDBC run.
3. Update the CF 377.9 Action Fragment Variable Population to list all the months in a Multi-Month EDBC where supplemental benefits are issued.
4. Update the CF 377.9 Message Fragment Variable Population to populate with a sum of all supplemental benefits issued during a Multi-Month EDBC run.
5. Remove logic suppressing the SAR2, AR2, and AR2SAR forms
6. Remove Logic suppressing Notices from being generated during a Multi-Month EDBC run.

1.4 Assumptions

1. This effort will only update Cal-Fresh. Other programs will be modified in future SCR, once the changes are confirmed in these programs.
2. This effort will not suppress the CalFresh Notice when CalFresh was initially approved with expedited approval or pending verifications. CA-277738 will suppress this Notice.
3. This effort will not change any logic concerning Single Month EDBCs. All updates will only be applicable for Multi-Month EDBCs, except for updates made to CF 377.9 Variable Population.
4. A multi-month EDBC can only be ran for 6 months. This is how the system currently works, and this effort will not change this functionality.

2 RECOMMENDATIONS

2.1 Add new logic to for month-month comparisons in a Multi-Month EDBC run.

2.1.1 Overview

Currently in a Multi-Month EDBC run, all months are evaluated against the first month in the Multi-Month EDBC for changes.

This recommendation will create new logic that will enable month-month comparison throughout the lifetime of a multi-month EDBC run.

2.1.2 Description of Changes

The following updates will not affect the initial month of a Multi-Month EDBC run, only subsequent months. The initial month should use the already existing logic, which compares against the previously saved EDBC.

For every month in a multi-month EDBC run (except the initial month), logic should do the following:

1. First, check the previous month in the current Multi-Month EDBC run
   a. If there is a change, then issue a change NOA and skip step 2.
   b. If there is no change, proceed to step 2.
   c. If there is no previous month, then this is the first month of a Multi-Month EDBC run. Existing logic will be used.
2. If there is no change in step 1, then check against the current Month in the previously saved EDBC.
   a. If there is a change, issue a Change NOA.
   b. If there is no change, then no Change NOA will be issued for this month.
   c. If there is no previously saved EDBC, than there is no Change and no Change NOA will be issued for this month.

*Note: Below tables are not factoring in supplemental generation. See recommendation 2.2 for supplemental generation.
The Values below are total benefit payouts for a specific month.
Red arrow = first check, Green arrow = second check

Month	10/28/24	11/15/24	Result
September		$100	No Change, Intake
October		$100	No Change
November		$180	Change

^Intake Scenario^

Month	10/28/24	11/15/24	Result
September	$50	$100	Change
October	$150	$100	Change (Overpayment)
November	$180	$150	Change

Month	10/28/24	11/15/24	Result
September	$50	$100	Change
October	$75	$100	Change
November	$90	$150	Change

Technical Notes:

- A flag should be added to indicate if a month is part of a Multi-Month EDBC. This flag will be used to determine whether or not to use the new Multi-Month comparison logic and the new Supplemental logic added in recommendation 2.2
- This new first picture logic will only be used for Multi-Month EDBC runs. This will be added in addition to the existing first picture logic in use today. Multi-Month EDBC runs will use this first picture logic, while single month EDBC runs will use the existing first picture logic.
- This logic will only affect First Picture, the action determination logic will not be changed.
- To tell if a month is the first in a Multi-Month run check the previously saved EDBC. If that month has the multi-month flag than it is part of the multi-month run, and the current month is not the first month. If it does not have the flag, it is not part of the current Multi-Month EDBC run, and the current month is the first month in the Multi-Month EDBC run.

2.2 Add logic for Supplemental Notices in a Multi-Month Scenario

2.2.1 Overview

Supplemental benefits are issued when there is a recalculation in benefit payout for a certain month if that month's benefits have already been sent out. In a multi-month run, there can be multiple months that require a supplemental payment.

This recommendation will add logic that will generate a Supplemental Notice once during the Multi-Month EDBC run informing the household of all supplemental benefits during the multi-month period.

2.2.2 Description of Changes

A single supplemental NOA will be issued once in a multi-month EDBC run for all months that have supplemental benefits.

Currently, supplemental Benefits are issued when:

1. There exists a previously saved EDBC for the current month, and benefits have been sent out in this month.
2. There is a recalculation in benefits in the same month between the Previously saved EDBC and the current EDBC.

Note: The above behavior already exists in the system and will not be updated.

This recommendation will update system behavior to do the following:

The supplemental NOA will be issued once during the Multi-Month EDBC run. It will populate all the variables with a sum of all supplemental benefits issued during a Multi-Month EDBC run. It will also list all the months where supplemental benefits are issued.

This supplemental NOA will be generated on the first month the supplement is issued. It will then look ahead in the Multi-Month EDBC run and sum all Supplemental benefits. All future supplemental NOAs in the Multi-Month EDBC run will be suppressed.

*Note: This only lists supplemental notices. For changes see recommendation 2.1

Month	10/28/24	11/15/24	Result
September	$150	$200	Supplemental Generated, populates with September and November supplemental benefits.
October	$150	$150	No Supplement
November	$180	$200	Supplemental Suppressed
December		$200	No Supplement

- A single supplemental would be issued once for the months of September and November

Month	10/28/24	11/15/24	Result
September	$100	$150	Supplemental generates, populates with September and October supplemental benefits
October	$100	$150	Supplemental suppressed
November	$100	$100	No Supplement
December		$100	No Supplement

- A single supplemental NOA will be generated once for the months of September and October

Technical Notes:

- The Supplemental NOA will be generated the first month supplemental benefits will be issued
- All other supplemental NOAs in the Multi-Month EDBC run will be suppressed.
- A running total of Supplemental benefits need to be tracked throughout the Multi-month EDBC run, and added up for the Variable Population on the CF 377.9 Notice
- All EDBCs have already been ran prior to NOA generation logic. This information needs to be added to the eligibility case before we call process NOAs to allow the NOA to look forward at future months benefit amounts and create a sum of benefit amounts.
- This logic should only be used in Multi-Month EDBC Runs.
- Only the first Supplemental reason will be displayed on the Notice. All other supplemental reasons will be suppressed. This information should be relayed to the user on a Change NOA, which will generate according to recommendation 2.1.

2.3 Update the CF 377.9 Notice Action Fragment to list all months where supplemental benefits are paid out

2.3.1 Overview

This effort will update the Variable population of this Action Fragment to list each month in a Multi-month EDBC run that has a supplemental or a claim balance.

Action Fragment Name and ID: Action Fragment being added in CA-234917
State Form/NOA: CF 377.9 (8/20) Notice of Back CalFresh
Program(s): CalFresh
Action Type(s): Supplement
Fragment Level: Program
Repeatable: N

Languages: English, Spanish

2.3.2 Form/NOA Verbiage

2.3.3   Update Fragment XDP

There will be no updates to the Fragment XDP.

2.3.4 Form/NOA Variable Population

2.3.5   Add/Update Fragment Variable Population

This effort will update the Month variable to populate with a list of all months in a Multi-Month EDBC where a supplemental NOA would be issued

Variable Name	Population	Formatting*
<Month>	This variable will populate with a list of all months where supplemental Benefits are paid out for the same Supplemental Reason. For example, if the Household Size increase in September, and benefits have been recalculated for September and October, this variable will populate with: "September, October"	Arial, size 10

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

Technical note:
- The multi-month EDBC flag should indicate if an EDBC is part of a multi-month run.
- The variable population should use the logic added in recommendation 2.2 to "look forward".

Variables Requiring Translations: None

2.3.6 Form/NOA Generation Conditions

2.3.7   Updates to Fragment Generation

There will be no updates to fragment generation.

2.4 **Update the CF 377.9 Notice Message Fragment Variable Population to list a sum of supplemental benefits over a Multi-Month EDBC run.**

2.4.1 Overview

This effort will update the variable population to contain the benefit amounts for all months where the supplement is effective, for the same supplemental reason.

Message Fragment Name and ID: Message Fragment being added in CA-234917
State Form/NOACF 377.9
Current Program(s): CalFresh
Current Action Type: Supplement
Current Fragment Level: Program
Currently Repeatable: N
Existing Languages: English, Spanish

2.4.2 Form/NOA Verbiage

Update Fragment XDP
There will be no updates to Fragment XDP

2.4.3 Form/NOA Variable Population

Add/Update Fragment Variable Population
Variable population will be updated to look forward at the EDBC and sum all the supplement amounts for a specific supplemental reason.

Variable Name	Population	Formatting*
$<InitialClaimBalance> Example:$50.00 March: 50$ April: 50$ May: 0$ Initial Claim Balance : 100$	This variable is the amount before subtracting the Supplemental Benefit Amount from the Claim Balance. **Technical note:** RemainingBalanceAmount is an existing variable that could be implemented here. Update: If this Notice is generated as part of a Multi-Month EDBC run, this variable will be a sum of claim balances throughout a multi-month EBDC run.	Arial Font Size 10

$<SupplementalBenefitAmountIssued> Example:$0.00	This is the Supplemental CF amount that will be issued to the household. Update: If this NOA is generated in a Multi-Month EDBC run, this should be a sum of all the supplemental issuances issued each month during a multi-month EDBC Run.	Arial Font Size 10
$<ClaimBalance> Example: March: 30$ April: 30$ May: 0$ <ClaimBalance>: $60.00	This variable should represent the final claim amount owed by the household after the supplement has been applied to the active CalFresh overissuance by CalFresh. **Technical note:** This ClaimBalance variable is an already existing variable used when programs have a claim balance. Update: This should be updated to be the final claim amount owed after the sum of supplements have been applied to the active CalFresh overissuance.	Arial Font Size 10
$<SupplementalBenefitEligibleAmount> Ex: March: 20$ April: 20$ May: 0$ <SupplementalBenefitEligibleAmount>: $40.00	This is the CF supplemental amount that the household is eligible for. **Technical note:** A currently existing variable that could be used for this called AuthorizedAmount. Update: If this NOA is generated as part of a Multi-Month EDBC, this should be updated to be the sum of the Supplemental Benefit Eligible Amount for each month in a Multi-month Run.	Arial Font Size 10

$<RecoupmentAmount>\n\nExample:\nMarch: 20$\nApril: 20$\nMay: 0$\n<RecopmentAmount>:\n$40.00	This variable represents the supplemental CF amount that is being applied to an existing CF overissuance. <SupplementalBenefitEligibleAmount> to pay off <InitialClaimBalance>.\n\n**Technical note:**\nRecoupmentAmount is an already existing variable used when programs have a claim balance.\n\nUpdate: This should be the total amount recouped from the person over the entire Multi-Month run.	Arial Font Size 10

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

Technical note:
- The multi-month EDBC flag should indicate if an EDBC is part of a multi-month run.
- The variable population should use the logic added in recommendation 2.2 to "look forward".

Variables Requiring Translations: None

2.5 Update NOA logic Suppression for notices generating more than once in a multi-month EDBC run

2.5.1 Overview

Currently all Notices, the SAR 2, the AR 2, and the AR2SAR Forms are being suppressed if one has already generated in a multi-month scenario. This should be updated to allow these to generate multiple times in a multi-month scenario.

2.5.2 Description of Change

1. Remove the logic suppressing the SAR 2, AR 2, and AR2SAR forms
2. Remove the logic suppressing NOAs if one has already generated in a multi-month EDBC

3. The new logic added in the previous recommendations will support the generation of these NOAs under the expected scenarios

3   SUPPORTING DOCUMENTS

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

Number	Functional Area	Description	Attachment
1	NOAs	Supplement NOA Mockup with no claim balance	Supplemental NOA Mockup Message 1
2	NOAs	Supplement NOA Mockup with claim balance	Supplemental NOA Mockup Message 2

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-232599

Create a Journal Entry When an Appointment is Cancelled

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Andrea Rodriguez, Howard Suksanti
	Reviewed By	Michael Wu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/26/2024	1.0	Initial Revision	Andrea Rodriguez, Howard Suksanti
01/10/2024	1.1	Updated the journal long description	Andrea Rodriguez, Howard Suksanti

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1 OVERVIEW

This SCR will add a journal entry when an appointment is canceled through CalSAWS application or Self-Service Portal.

1.1 Current Design

A Customer can Cancel an appointment via Self-Service Portal, Outbound Appointment Reminder Campaign (IVR), or by calling the county office. When the Customer cancels via Self-Service Portal, the system generates an E-mail to the Worker. No other communication is provided. CA-230664 added the E-mail for Self-Service Portal cancel appointments.

1.2 Requests

Add a Journal entry to the case when a customer cancels their appointment through Self-Service Portal, Outbound Appointment Reminder Campaign (IVR), or when the Customer contacts the county and a User sets the appointment status to Cancelled.

The Journal should include the Source of the cancellation, Date/Time, and Appointment information. Type should be Cancelled Appointment.

1.3 Overview of Recommendations

1. Update the Customer Appointment Detail page to generate a cancelled appointment journal when the appointment status is set to cancelled at the request of the customer.
2. Update the Journal Detail page to have a new journal type called 'Cancelled Appointment'.
3. Update the Journal Search page to allow searching journals by the new 'Cancelled Appointment' type.
4. Update CalSAWS Appointment API to log a journal when canceling an appointment.
5. Update Outbound Appointment Reminder Campaign to use the new Cancel Appointment Journal Type.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically stated by this document.
2. There are no changes on the Self-Service Portal.
3. There is no change on the functionality of Outbound campaign. The SCR will only change the Journal Type. Outbound campaign will utilize the Journal API to create Journal Entry.

2   RECOMMENDATIONS

2.1   Customer Appointment Detail

2.1.1   Overview

The Customer Appointment Detail page allows the worker to update an appointment's attendance status and status reason on the General Information section. This SCR will update the page to generate a journal when an appointment is cancelled by the worker at the request of the customer. The journal will generate when the record is saved with the status as 'Cancelled'.

2.1.2   Customer Appointment Detail Mockup

Customer Appointment Detail

✱- Indicates required fields   [Save] [Remove] [Cancel]

Attendees	
Customers✱	**Attendance**
DOE, JANE 38F	Canceled ▼
DOE, JOHN 18M	Canceled ▼

Workers✱
19DP341707 - Worker Name

General Information

Category: ✱	Appointment-Type: ✱	Status: ✱	Status Reason: ✱
General Appointment	Client Requested	Cancelled ▼	Client Initiated ▼

Office:
CalSAWS Project Office

Location: ✱

123 MAIN ST
NORWALK, CA 90650

Appointment Letter Comments:	Appointment Comments:
Sample Text	Sample Text

☐ Print Appointment Letter
☐ Outbound IVR Call

Dates

Begin Date: ✱	Begin Time: ✱	Appointment Duration: ✱
01/01/2025	8:00 AM	1 hour

[Save] [Remove] [Cancel]

Figure 2.3.1 – Current Customer Appointment Detail page (For Reference Only)

2.1.3 Description of Changes

1. Update the Customer Appointment Detail page to generate a journal when an appointment is cancelled through the General Information section.
    a. The cancelled appointment journal will generate when the worker updates the Status drop-down to 'Cancelled' and saves the appointment record with this value.
    b. The cancelled appointment journal will contain the following values:
        i. Journal Template: Classic
        ii. Journal Category: All
        iii. Journal Type: Cancelled Appointment
        iv. Initiated By: User
        v. Method of Contact: [Blank]
        vi. Short Description: Customer Appointment Cancelled
        vii. Long Description: Customer Appointment for [Category]/[Type] on [Begin Date] [Begin Time] with [Worker ID] was cancelled on [Cancellation Date] [Cancellation Time] by the [customer/worker].
            1. Category will be the value selected on the Category field on the Customer Appointment Detail page.
            2. Type will be the value selected on the Appointment-Type field on the Customer Appointment Detail page. If the Appointment-Type is blank, it will display as blank without the '/' on the Journal Long Description.
            3. Begin Date will be the Date on the Begin Date field on the Customer Appointment Detail page and will be formatted in [MM]/[DD]/[YYYY].
            4. Begin Time will be the value on the Begin Time field on the Customer Appointment Detail page and will be formatted in [HH]:[MM] [XM].
            5. Cancellation Date will be the date that the appointment was updated to 'Cancelled' on the Customer Appointment Detail page.
            6. Cancellation Time will be the time that the appointment was updated to 'Cancelled' on the Customer Appointment Detail page.
            7. When the value selected on the Status Reason field on the Customer Appointment Detail page is 'Client Initiated' the journal will indicate it was cancelled 'by the customer.'
            8. When the value selected on the Status Reason field on the Customer Appointment Detail page is 'Worker Initiated' the journal will indicate it was cancelled 'by the worker.'

9. When multiple workers are associated to the appointment, the worker IDs will be separated by semicolons.
c. The journal will be created for the case associated with the appointment.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Worker Schedule
- **Task Navigation:** Customer Appointment Search

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page has been assessed for accessibility opportunities and meets Accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Journal Detail

2.2.1 Overview

The Journal Detail window allows a worker to view, update, or add journal entries. This SCR will create a new journal type for journals created by the system when an appointment is cancelled at the request of a customer. The new journal type, 'Cancelled Appointment', will not be available when a worker manually creates a journal entry.

2.2.2   Journal Detail Mockup

Journal Detail   🔴**Help**

✳- Indicates required fields

			Collapse	Append	Suppress	Print

Case Number:	**Case Name:**
I400048	Case Name

Entry Information

Journal Category: ✳	**Journal Type:** ✳
All	Cancelled Appointment
Initiated By:	**Method of Contact:**
User	

Short Description: ✳
Customer Appointment Cancelled

Long Description:
Customer Appointment for General Appointment/Client Requested on 01/01/2025 08:00 AM with 19DP341707 was cancelled on 01/01/2025 07:00 AM by the customer.

			Collapse	Append	Suppress	Print

(01/01/2025 7:00 AM, Worker Name, 01AA0000AA, Worker Classification)

Figure 2.1.1 – Appointment Cancellation Journal Detail

2.2.3   Description of Changes

1. Create a new journal type called 'Cancelled Appointment'.
    a. The 'Cancelled Appointment' journal type will only be available for use by the system. A worker will not be able to view the option when manually creating a journal entry on the Journal Detail page.

2.2.4   Page Location

- **Journal**

2.2.5   Security Updates

N/A

2.2.6   Page Mapping

N/A

2.2.7   Accessibility

This page has been assessed for accessibility opportunities and meets Accessibility standards.

2.2.8   Page Usage/Data Volume Impacts

N/A

2.3 Journal Search

2.3.1 Overview

The Journal Search page allows the worker to search journal entries by the type of journal. This SCR will update the 'Type' drop-down on the page to allow the worker to have the option to search by 'Cancelled Appointment' journals.

2.3.2 Journal Search Mockup

Figure 2.2.1 – Journal Search with 'Appointment Cancellation' type

2.3.3 Description of Changes

1. Update the 'Type' drop-down on the Journal Search page to include 'Cancelled Appointment' as a search option.
   a. The option will display in the drop-down in alphabetical order after the abbreviated options.

2.3.4 Page Location

- **Journal**

2.3.5 Security Updates

N/A

2.4 Appointment API

2.4.1 Overview

SCR CA-214745 created Appointment API for County applications and Self-Service Portal to be able to retrieve, update, create appointments.

2.4.2 Description of Change

1. Update Appointment API to create a journal entry when the API cancels an appointment. The update will apply to all 3 existing API versions (version 1, 2, 3).

    a. The cancelled appointment journal will contain the following values:
       i. Journal Category: All
       ii. Journal Type: Cancelled Appointment
       iii. Initiated By: System
       iv. Method of Contact: [Blank]
       v. Short Description: Customer Appointment Cancelled
       i. Long Description: Customer Appointment for [Category]/[Type] on [Begin Date] [Begin Time] with [Worker ID] was cancelled on [Cancellation Date] [Cancellation Time] by the [customer/worker].
          1. Category will be the value selected on the Category field on the Customer Appointment Detail page.
          2. Type will be the value selected on the Appointment-Type field on the Customer Appointment Detail page. If the Appointment-Type is blank, it will display as blank without the '/' on the Journal Long Description.
          3. Begin Date will be the Date on the Begin Date field on the Customer Appointment Detail page and will be formatted in [MM]/[DD]/[YYYY].
          4. Begin Time will be the value on the Begin Time field on the Customer Appointment Detail page and will be formatted in [HH]:[MM] [XM].
          5. Cancellation Date will be the date that the appointment was updated to 'Cancelled' on the Customer Appointment Detail page.

6. Cancellation Time will be the time that the appointment was updated to 'Cancelled' on the Customer Appointment Detail page.
7. When multiple workers are associated to the appointment, the worker IDs will be separated by semicolons.
8. [customer/worker] will be based on the Status Reason.

Note: The journal entry will be created when the API cancels an appointment disregarding the source of the application that calls the API (Self-Service Portal, other County applications, etc.)

2.4.3 Partner Integration Testing
Y

2.4.4 Execution Frequency
Real time API.

2.4.5 Key Scheduling Dependencies
N/A.

2.4.6 Counties Impacted
All Counties.

2.4.7 Category
N/A.

2.4.8 Data Volume/Performance
N/A.

2.4.9 Interface Partner
Self-Service Portal, County applications.

2.4.10 Failure Procedure/Operational Instructions
Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file

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

2.5   Cancel an appointment through IVR

2.5.1   Overview

Currently when an appointment is canceled through Outbound Appointment Reminder Campaign, the system creates a journal with the type of Document.

2.5.2   Description of Change

1. Update the auto journal when an appointment is canceled through Outbound Appointment Reminder Campaign to have the journal type of Cancel Appointment.

2.6   Automated Regression Test

2.6.1   Overview

Create automated regression test scripts to verify that appropriate journal entries are created when an appointment is cancelled via the Customer Appointment Detail page or the Appointment API.

2.6.2   Description of Change

1. Create regression scripts to verify that type value 'Cancelled Appointment' is available on the following pages:
   a. Journal Search page
   b. Journal Detail page in create mode
   c. Journal Detail page in view mode
   Note: Verification of search results by type value is out of scope.
2. Create regression scripts to verify that a new journal entry with type 'Cancelled Appointment' can be created and saved on the Journal Detail page.
3. Create regression scripts to verify that an appropriate journal entry is created when an appointment is:
   a. Updated to 'Cancelled' status on the Customer Appointment Detail page
   b. Created and saved with an initial status of 'Cancelled' on the Customer Appointment Detail page

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      c. Updated to 'Cancelled' status through the Appointment API (PUT endpoint by ID)

      d. Created with an initial status of 'Cancelled' through the Appointment API (POST endpoint)

4. Create regression scripts to verify that no journal entry is created when an appointment in 'Cancelled' status is updated without a status change:

      a. On the Customer Appointment Detail page in edit mode

      b. On the Customer Appointment Detail page in reschedule mode

      c. Through the Appointment API (PUT endpoint by ID)

Technical Note: The Appointment API scenarios will only be verified in the latest API version.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1307	The LRS shall provide for the support of system interfaces and integration necessary for the coordination of services with other federal, State, and COUNTY agencies and other external agencies, for the purposes of reducing paperwork, verification of LRS Data, and preventing the duplication of LRS Data entry.	The SCR will update the logic of the Appointment API.

CA-248079

Text Message Opt-In Report

	DOCUMENT APPROVAL HISTORY		
CalSAWS	**Prepared By**	TK Bui	
	Reviewed By	Susanna Martinez, Thao Ta	

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
10/16/2024	1.0	Initial document	TK Bui
12/12/2024	1.1	• Clarified wording that report will cover Active and Pending cases and programs, not only Active ones. • Added filters for program(s), program status, begin date, and end date. • Updated Mockup photos based on updates to the Measures and Filters.	TK Bui
1/10/2024	1.2	• Clarified measure calculations for cases which are not opted in. • Updated column definitions for phone number and primary applicant. • Updated report description.	TK Bui

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CA-248079 – Text Message Opt-In Report

1 OVERVIEW

Currently, counties are able to use ad-hoc requests to access information about active and pending cases where the primary applicant is marked as "Opt-In" for Text Messaging on the CalSAWS Contact Detail page. However, counties have expressed resource limitations on being able to generate ad-hoc requests on a regular basis.

In order to help counties more easily access primary applicant Text Messaging Opt-In information, a new curated on request report called the "Text Message Opt-In Report" will be created. The Text Message Opt-In Report will allow for counties to be able to identify the number of active and pending cases where the primary applicant has opted into Text Messaging, and then use this information to better implement campaigns to encourage as many customers as possible to opt into Text Messaging. The Text Message Opt-In Report will include the overall number of active and pending cases, the number and percentage of active and pending cases where the primary applicant has a phone number that is marked as "Opt-In" for Text Messaging, the number and percentage of active and pending cases where the primary applicant has NO phone number marked as "Opt-In" for Text Messaging, and details on all active and pending cases and the "Opt-In" statuses for Text Messaging. Additionally, primary applicant Opt-In information for Email Reminders, E-Notification Emails, and Two-Way Messaging will also be provided.

Recently, SCR CA-279707 was also created, which will introduce changes to the CalSAWS Contact Detail page where primary applicants will be able to "Opt-In" for Text Messaging *by specific programs* if they have a phone number that is marked as "Opt-In" for Text Messaging. Due to this additional ability for primary applicants to "Opt-In" for Text Messaging *by program*, the Text Message Opt-In Report will also include measures on the overall number of active and pending *programs*, the number and percentage of active and pending *programs* where the primary applicant has opted in for Text Messaging *by program*, the number and percentage of active and pending *programs* where the primary applicant has NOT opted in for Text Messaging *by program*, and details on all active and pending *programs* and the "Opt-In" statuses for Text Messaging *by program*.

1.1 Current Design

Counties are able to use ad-hoc requests to access information about active and pending cases where the primary applicant is marked as "Opt-In" for Text Messaging on the CalSAWS Contact Detail page. However, counties have expressed resource limitations on being able to generate ad-hoc requests on a regular basis.

1.2 Requests

Create a new on request report that provides the overall number of active and pending cases, the number and percentage of active and pending cases where the primary applicant has chosen to "Opt-In" for Text Messaging, the number and percentage of active and pending cases where the primary applicant has NOT chosen to "Opt-In" for Text Messaging, and details on all active and pending cases.

Also provide the overall number of active and pending programs, the number and percentage of active and pending programs where the primary applicant has chosen to "Opt-In" for Text Messaging by program, the number and percentage of active and pending programs where the primary applicant has NOT chosen to "Opt-In" for Text Messaging by program, and details on all active and pending programs.

Additionally, provide the primary applicant's "Opt-In" statuses for Text Messaging (both by phone number and by programs), Email Reminders, E-Notification Emails, and Two-Way Messaging. Allow for this report to be filtered by the Worker, Unit, Office, and County Levels at minimum.

1.3 Overview of Recommendations

1. Create a new On Request Report called the Text Message Opt-In Report.
   a. Provide measures on the overall number of active and pending *cases*, the number and percentage of active and pending *cases* where the primary applicant has opted in for Text Messaging, and the number and percentage of active and pending *cases* where the primary applicant has NOT opted in for Text Messaging.
   b. Provide measures on the overall number of active and pending *programs*, the number and percentage of active and pending *programs* where the primary applicant has opted in for Text Messaging *by program*, and the number and percentage of active and pending *programs* where the primary applicant has NOT opted in for Text Messaging *by program*.
   c. Provide details on all active and pending cases and the primary applicant's "Opt-In" status for Text Messaging.
   d. Provide details on all active and pending programs and the primary applicant's "Opt-In" status for Text Messaging by program.
   e. Provide the primary applicant's "Opt-In" status for Email Reminders, E-Notification Emails, and Two-Way Messaging.
   f. Allow for this report to be filtered by the Worker, Unit, Office, and County Levels.

1.4 Assumptions

1. This report will be created after the updates to the CalSAWS Contact Detail page from CA-279707 are enabled for county use with SCR CA-260623.

2. If a primary applicant has a phone number that is marked as "Opt-In" for Text Messaging, they must opt-in for Text Messaging *by program* for at least one program option on the CalSAWS Contact Detail page.

2 RECOMMENDATIONS

2.1 Text Message Opt-In Report

2.1.1 Overview

The Text-Message Opt-In Report is a new curated on request report that is refreshed daily. The report provides summarized information such as:
- The overall number of active and pending cases.
- The number and percentage of active and pending cases where the primary applicant is marked as "Opt-In" for Text Messaging on the CalSAWS Contact Detail page.
- The number and percentage of active and pending cases where the primary applicant is NOT marked as "Opt-In" for Text Messaging on the CalSAWS Contact Detail page.
- The overall number of active and pending programs.
- The number and percentage of active and pending programs where the primary applicant is marked as "Opt-In" for Text Messaging *by program* on the CalSAWS Contact Detail page.
- The number and percentage of active and pending programs where the primary applicant is NOT marked as "Opt-In" for Text Messaging *by program* on the CalSAWS Contact Detail page.

This information can be used by counties to understand the current reach they have to their customers by identifying the active and pending cases and programs which have or have not been opted into Text Messaging at the phone number and program levels. Then, counties can use this information to properly implement campaigns to encourage as many people as possible to opt into Text Messaging.

The report also provides details on all active and pending cases and programs, as well as the "Opt-In" statuses for Text Messaging (both by phone number and by programs), Email Reminders, E-Notification Emails, and Two-Way Messaging. Additionally, the report can be filtered by the Worker, Unit, Office, and County Levels.

2.1.2 Text Message Opt-In Report Mockup

Note: In this section, for Figures 2.1.2.5 – 2.1.2.10, data from multiple counties are displayed. However, it should be noted that there is no change to the current process of report generation for the county users or project staff. County users will *only* be able to see data that is specific to *that county*, while project staff can generate the report for *all counties*.
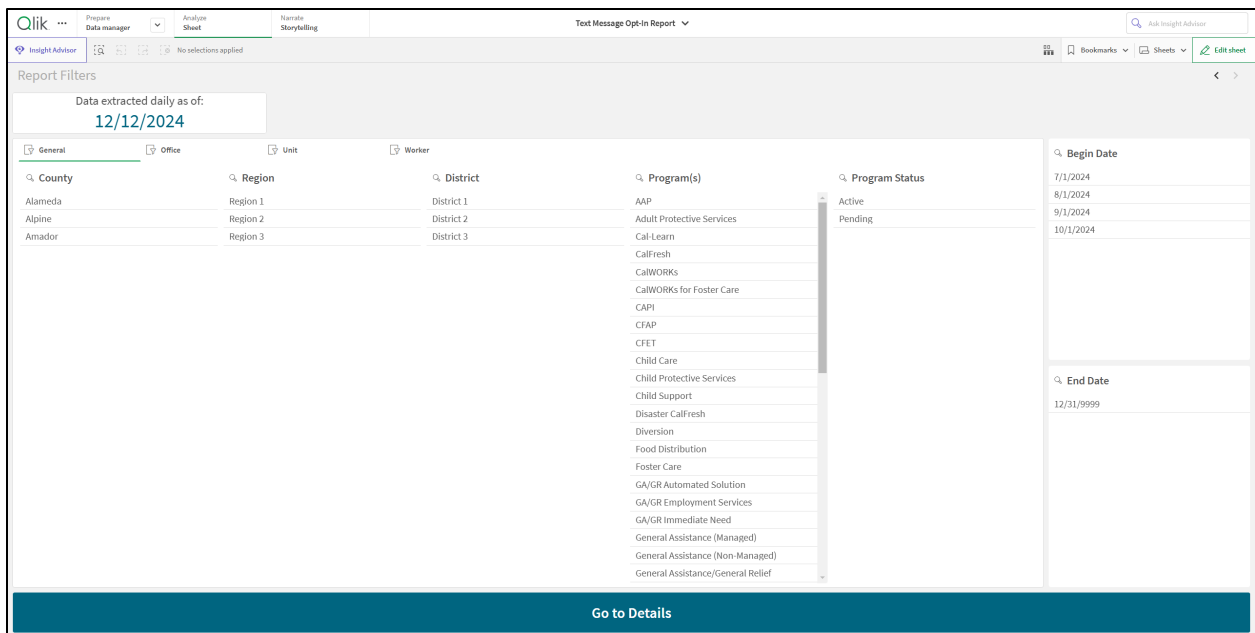
Figure 2.1.2.1 – Text Message Opt-In Report Mockup (Report Filters Sheet, General Tab)
Note: The full report mockup can be found in the Supporting Documents section.
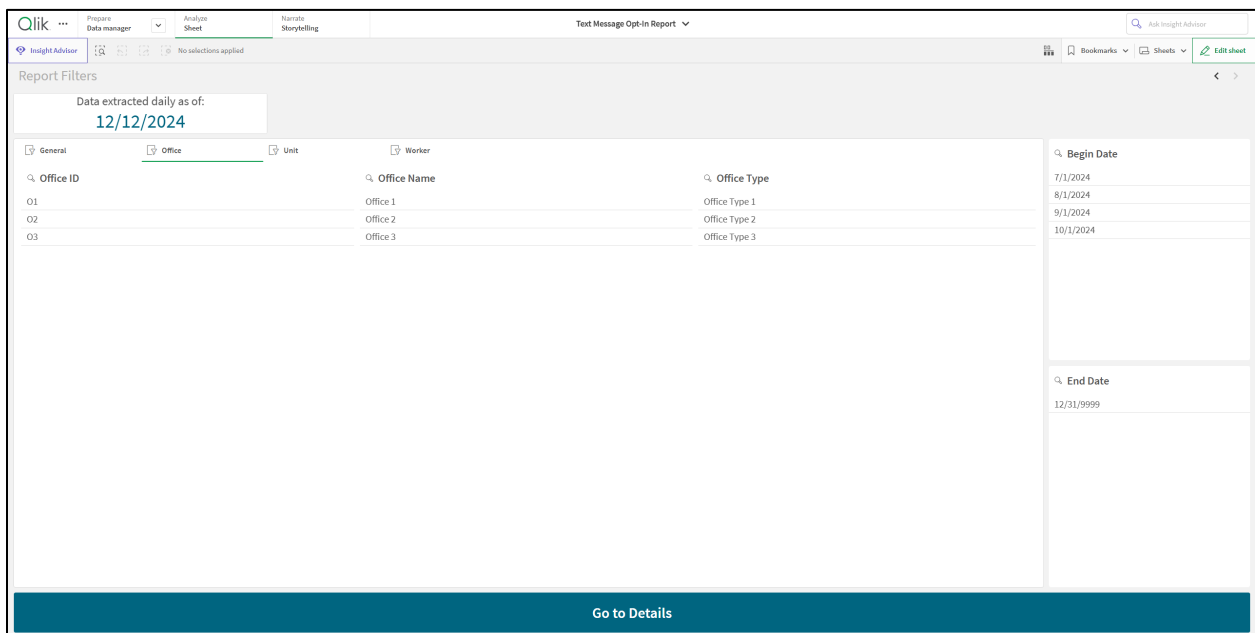
Figure 2.1.2.2 – Text Message Opt-In Report Mockup (Report Filters Sheet, Office Tab)
Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.3 – Text Message Opt-In Report Mockup (Report Filters Sheet, Unit Tab)
Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.4 – Text Message Opt-In Report Mockup (Report Filters Sheet, Worker Tab)
Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.5 – Text Message Opt-In Report Mockup (Details sheet, Bookmark options)
Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.6 – Text Message Opt-In Report Mockup (Details Sheet, "All cases and programs" bookmark)
Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.7 – Text Message Opt-In Report Mockup (Details Sheet, "All cases that are opted in for text messaging" bookmark)

Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.8 – Text Message Opt-In Report Mockup (Details Sheet, "All programs that are opted in for text messaging by program" bookmark)

Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.9 – Text Message Opt-In Report Mockup (Details Sheet, "All cases that are NOT opted in for text messaging" bookmark)
Note: The full report mockup can be found in the Supporting Documents section.

Figure 2.1.2.10 – Text Message Opt-In Report Mockup (Details Sheet, "All programs that are NOT opted in for text messaging by program" bookmark)
Note: The full report mockup can be found in the Supporting Documents section.

2.1.3 Description of Change

1. Create a new on request report called the **Text Message Opt-In Report**, which is a curated on request report that is refreshed daily. The report captures information based on the following base population logic:

- The program status is currently either Active or Pending. If a program has multiple Active/Pending statuses, use the Program Detail record with the latest begin date.
    - o **Technical Note:**
        - PGM_DETL.STAT_CODE is (CT-72):
            - **AC** – Active
            - **PE** – Pending
        - The date on the report is between PGM_DETL.BEG_DATE and PGM_DETL.END_DATE. Use the PGM_DETL record with the latest PGM_DETL.BEG_DATE.
- The reported person is the primary applicant on the program.
    - o **Technical Note:**
        - PGM_ADMIN.ADMIN_CODE is (CT-255):
            - **PR** – Primary Applicant/Recipient
        - The date on the report is between PGM_ADMIN.BEG_DATE and PGM_ADMIN.END_DATE.
- If a primary applicant is marked as "Opt-In" for Text Messaging for a specific phone number on the CalSAWS Contact Detail page, the text message verification status is either Pending Verification or Verified. If there are multiple phone numbers, display the latest updated phone number for the primary applicant, prioritizing the phone number that is opted in for Text Messaging, if any.
    - o **Technical Note:**
        - If PH_NUM_PERS.ALLOW_TEXT_IND = 'Y', then PH_NUM_PERS.TEXT_VERIF_STAT_CODE is one of the following (CT-465):
            - **PV** – Pending Verification
            - **VF** – Verified
        - Use the PH_NUM_PERS record with the latest UPDATED_ON date.
- If a primary applicant is marked as "Opt-In" for Text Messaging for a specific phone number on the CalSAWS Contact Detail page, then the primary applicant can also choose to "Opt-In" for Text Messaging by Program. If a primary applicant has chosen to "Opt-In" for Text Messaging for a specific program, the text message verification status for that program is either Pending Verification or Verified.
    - o **Note:** For additional information and context on the new "Text Message Opt-In by Program" section of the Contact Detail page, see section 2.1: Contact Detail, particularly the mockups in section 2.1.2, from the CA-279707 design document.
    - o **Technical Note:** If PERS_OPT_IN_PGM.OPT_IN_IND = 'Y', then PERS_OPT_IN_PGM.STAT_CODE is one of the following (CT-465):
        - **PV** – Pending Verification
        - **VF** – Verified
- If the primary applicant has opted in for Email Reminders and/or E-Notification Emails, the email verification status is either Pending Verification or Verified.

- **Technical Note:** If PERS.EMAIL_REMIND_IND = 'Y' and/or PERS.EMAIL_NOTIF_IND = 'Y', then PERS.EMAIL_VERIF_STAT_CODE is one of the following (CT-465):
  - **PV** – Pending Verification
  - **VF** – Verified
- Opting in for Two-Way Messaging is set at the County Level. If a primary applicant's county has opted in for Two-Way Messaging, the primary applicant is also considered to be opted in for Two-Way Messaging.
  - **Technical Note:** CODE_DETL.REFER_TABLE_72_DESCR (CT-15) where CASE.COUNTY_CODE = CODE_DETL.CODE_NUM_IDENTIF.

2. **Text Message Opt-In Report** – This report will display the following columns:

Column Name	Column Description
County Code	This column contains the county code. **Technical Note:** CASE.COUNTY_CODE (CT-15)
County Name	This column contains the county name. **Technical Note:** This value is derived from CASE.COUNTY_CODE (CT-15).
Case Number	This column contains the case number. **Technical Note:** CASE.SERIAL_NUM_IDENTIF
Case Name	This column contains the case name. **Technical Note:** CASE.CASE_NAME
Primary Applicant	This column contains the name of the primary applicant. **Technical Note:** PERS.FIRST_NAME + PERS.MID_NAME + PERS.LAST_NAME + PERS.NAME_SUFFIX
Program	This column contains the program on the case where the primary applicant has opted in for Text Messaging. **Technical Note:** This value is derived from PGM.PGM_CODE (CT-18).

Program Status	This column contains the program status code of the program on the case where the primary applicant has opted in for Text Messaging. **Technical Note:** This value is derived from PGM_DETL.STAT_CODE (CT-72): • **AC** – Active • **PE** – Pending
Begin Date	This column contains the begin date of the program status. **Technical Note:** PGM_DETL.BEG_DATE
End Date	This column contains the end date of the program status. **Technical Note:** PGM_DETL.END_DATE
Phone Number	This column contains the phone number that the primary applicant uses to opt-in for text messaging. This can also be blank. **Technical Note:** PH_NUM.PH_NUM
Phone Number Type	This column contains the phone number type. **Technical Note:** This value is derived from PH_NUM.TYPE_CODE (CT-254): • **CE** – Cell • **FA** – Fax • **HO** – Home • **IV** – IVR • **ME** – Message • **MN** – Main • **TD** – TDD • **TF** – Toll Free • **WK** – Work
Opt-In for Text Messaging	This column contains the indicator of whether or not the primary applicant has a phone number that is opted in to text messaging. This can also be blank. Values: • N (No) • Y (Yes)

	Technical Note: PH_NUM_PERS.ALLOW_TEXT_IND

Opt-In for Text Messaging by Program	This column contains the indicator of whether or not the primary applicant has opted in to text messaging for the specific program.
	
	Values:
	   • N (No)
	   • Y (Yes)
	
	Technical Note: PERS_OPT_IN_PGM.OPT_IN_IND

Opt-In for Email Reminders	This column contains the indicator of whether or not the primary applicant has opted in to email reminders.
	
	Values:
	   • N (No)
	   • Y (Yes)
	
	Technical Note: PERS.EMAIL_REMIND_IND

Opt-In for E-Notification Emails	This column contains the indicator of whether or not the primary applicant has opted in to e-notification emails. This option is only available for primary applicants with a linked BenefitsCal account.
	
	Values:
	   • N (No)
	   • Y (Yes)
	
	Technical Note: PERS.EMAIL_NOTIF_IND

Opt-In for Two-Way Messaging	This column contains the indicator of whether or not the county which the primary applicant's case resides in is opted in for Two-Way Messaging. This value can also be blank.
	
	Values:
	   • N (No)
	   • Y (Yes)

	Technical Note: CODE_DETL.REFER_TABLE_72_DESCR (CT-15) where CASE.COUNTY_CODE = CODE_DETL.CODE_NUM_IDENTIF.

3. **Text Message Opt-In Report** – This report will display the following measures:

Measure Name	Measure Description
# Cases Opted In for Text Messaging	This measure displays the total number of active and pending *cases* that have been opted in for text messaging. **Technical Note:** Count the distinct active and pending *cases* where the primary applicant has opted in for text messaging in the "Opt-In for Text Messaging" column. • Count the distinct active and pending cases where PH_NUM_PERS.ALLOW_TEXT_IND = '**Y**'.
# Cases NOT Opted In for Text Messaging	This measure displays the total number of active and pending *cases* that have **NOT** been opted in for text messaging. **Technical Note:** Count the distinct active and pending *cases* where the primary applicant has NOT opted in for text messaging in the "Opt-In for Text Messaging" column. • Count the distinct active and pending cases where PH_NUM_PERS.ALLOW_TEXT_IND is either NULL or '**N**'.
# Cases	This measure displays the total number of active and pending *cases*. **Technical Note:** Count the distinct active and pending *cases*, regardless of the PH_NUM_PERS.ALLOW_TEXT_IND value. This should equal the sum of "# Cases Opted In for Text Messaging" and "# Cases NOT Opted In for Text Messaging".
% Cases Opted In for Text Messaging	This measure displays the percentage of "# Cases Opted In for Text Messaging" out of "# Cases". **Technical Note:** ("# Cases Opted In for Text Messaging" / "# Cases") * 100

% Cases NOT Opted In for Text Messaging	This measure displays the percentage of "# Cases **NOT** Opted In for Text Messaging" out of "# Cases". **Technical Note:** ("# Cases **NOT** Opted In for Text Messaging" / "# Cases") * 100
# Programs Opted In for Text Messaging	This measure displays the total number of active and pending *programs* that have been opted in for text messaging *by program*. **Technical Note:** Count the distinct active and pending *programs* where the primary applicant has opted in for text messaging in the "Opt-In for Text Messaging by Program" column. • Count the distinct active and pending *programs* where PERS_OPT_IN_PGM.OPT_IN_IND = '**Y**'.
# Programs NOT Opted In for Text Messaging	This measure displays the total number of active and pending *programs* that have **NOT** been opted in for text messaging *by program*. **Technical Note:** Count the distinct active and pending *programs* where the primary applicant has NOT opted in for text messaging in the "Opt-In for Text Messaging by Program" column. • Count the distinct active and pending *programs* where PERS_OPT_IN_PGM.OPT_IN_IND = '**N**'.
# Programs	This measure displays the total number of active and pending *programs*. **Technical Note:** Count the distinct active and pending *programs*, regardless of the PERS_OPT_IN_PGM.OPT_IN_IND value. This should equal the sum of "# Programs Opted In for Text Messaging" and "# Programs NOT Opted In for Text Messaging".
% Programs Opted In for Text Messaging	This measure displays the percentage of "# Programs Opted In for Text Messaging" out of "# Programs". **Technical Note:** ("# Programs Opted In for Text Messaging" / "# Programs") * 100
% Programs NOT Opted In for Text Messaging	This measure displays the percentage of "# Programs **NOT** Opted In for Text Messaging" out of "# Programs".

	Technical Note: ("# Programs **NOT** Opted In for Text Messaging" / "# Programs") * 100

4. **Text Message Opt-In Report** – This report will allow filtering by the following fields:
   - **Note:** These filters are organized across different filter tabs as seen in Figures 2.1.2.1-2.1.2.4 as follows:
     - **General** contains the filters for the County, Region, District, Program(s), and Program Status.
     - **Office** contains the filters for the Office ID, Office Name, and Office Type.
     - **Unit** contains the filters for the Unit ID, Unit Type, and Division.
     - **Worker** contains the filters for the Worker Name, Worker ID, and Classification Title.
     - **Begin Date** contains the filter for the program status Begin Date.
     - **End Date** contains the filter for the program status End Date.

Filter Name	Filter Description
County	This field will filter the list of cases to only include cases under the specified county/counties. **Technical Note:** This value is derived from CASE.COUNTY_CODE (CT-15).
Region	This field will filter the list of cases to only include cases under the selected region(s). **Technical Note:** This value is derived from OFFICE.REGN_CODE (CT-244).
District	This field will filter the list of cases to only include cases under the selected district(s). **Technical Note:** This value is derived from OFFICE.DISTR_CODE (CT-212).
Program(s)	This field will filter the list of cases to only include cases with the selected program(s). **Technical Note:** This value is derived from PGM.PGM_CODE (CT-18).
Program Status	This field will filter the list of cases to only include cases with programs with the selected program status(es).

	Technical Note: This value is derived from PGM_DETL.STAT_CODE (CT-72).
Office ID	This field will filter the list of cases to only include cases whose assigned worker is a part of the office(s) with the selected office ID(s). **Technical Note:** OFFICE.OFFICE_NUM_IDENTIF
Office Name	This field will filter the list of cases to only include cases whose assigned worker is a part of the office(s) with the selected office name(s). **Technical Note:** OFFICE.OFFICE_NAME
Office Type	This field will filter the list of cases to only include cases whose assigned worker is a part of the office(s) with the selected office type(s). **Technical Note:** This value is derived from OFFICE.TYPE_CODE (CT-253).
Unit ID	This field will filter the list of cases to only include cases whose assigned worker is a part of the unit(s) with the selected unit ID(s). **Technical Note:** UNIT.UNIT_NUM_IDENTIF
Unit Type	This field will filter the list of cases to only include cases whose assigned worker is a part of the unit(s) with the selected unit type(s). **Technical Note:** This value is derived from UNIT.TYPE_CODE (CT-287).
Division	This field will filter the list of cases to only include cases under the selected division(s). **Technical Note:** This value is derived from OFFICE.DIVSN_CODE (CT-10174).
Worker Name	This field will filter the list of cases to only include cases assigned to the worker(s) with the selected name(s). **Technical Note:** STAFF.FIRST_NAME, STAFF.MID_NAME, STAFF.LAST_NAME, STAFF.NAME_SUFFIX

Worker ID	This field will filter the list of cases to only include cases assigned to the worker(s) with the selected worker ID(s). **Technical Note:** STAFF_WRKR.WRKR_NUM_IDENTIF
Classification Title	This field will filter the list of cases to only include cases whose assigned worker is under the selected classification title(s). **Technical Note:** This value is derived from STAFF.CLASS_CODE (CT-286).
Begin Date	This field will filter the list of cases to only include cases with programs whose begin date is selected. **Technical Note:** PGM_DETL.BEG_DATE
End Date	This field will filter the list of cases to only include cases with programs whose end date is selected. **Technical Note:** PGM_DETL.END_DATE

2.1.4 Report Location

- **Global:** Reports
- **Local:** On Request
- **Task:** Administrative
- **Description:** Provides information on primary applicant opt-ins for Text Messaging, Emails, and Two-Way Messaging for active and pending cases and programs.

2.1.5 Counties Impacted

All counties will be impacted.

2.1.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
TextMessage OptInReport	Grants access to the Text Message Opt-In Report.	• LRS Reports Access – Operational Reports • Text Notification Report

2. Security Groups

Security Group	Group Description	Group to Role Mapping

N/A	N/A	N/A

2.1.7 Report Usage/Performance

This report will be able to be accessed by all counties.

Technical Note: The report is expected to perform similarly to other administrative on request reports, since this report does not access high volume tables that would hinder its performance.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Text Message Opt-In Report Mockup	Text Message Opt-In Report Mockup.docx
2	Reports	Security Matrix	CA-248079 Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

Req #	Requirement Text	How Requirement Met
2.24.2.4	The CalSAWS shall produce several types of reports which support all levels of staff in managing their particular workloads, including management reports, State level reports, and ad hoc reports.	The Text Message Opt-In Report will be created to provide information on primary applicant opt-ins for Text Messaging, Emails, and Two-Way Messaging for active and pending cases and programs.

CA-260623

Update CalSAWS Text Messaging Functionality to Allow Opt-In by Program - Phase 3

DOCUMENT APPROVAL HISTORY			
CalSAWS	Prepared By		Andrea Rodriguez, Shining Liu, Eric Haymes, Nithin Halesh, Gillian Bendicio, Susanna Martinez
	Reviewed By		Rupalatha Putta, Mathew Lower, Edgars Reinholds, Gokul Suresh, Priya Sridharan,
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
07/02/2024	1.0	Initial	Andrea Rodriguez, Shining Liu, Eric Haymes, Nithin Halesh, Gillian Bendicio, Susanna Martinez
12/03/2024	1.1	Updates made to Section 2.1, 2.11, and 2.19	Andrea Rodriguez, Shining Liu

Table of Contents

CA-260623 Update CalSAWS Text Messaging Functionality To Allow Opt-In By Program - Phase 3

1 OVERVIEW

The Federal Communications Commission (FCC) declaratory ruling provided guidance to federal and state governmental agencies and their partners on the applicability of the Telephone Consumer Protection Act (TCPA) of 1991 when making automated calls or text messages. The ruling states that the TCPA does not apply to calls/texts that are initiated by DHCS for purposes of Medi-Cal.

Currently, the text messaging consent functionality in CalSAWS does not allow for consent to be differentiated by program. In other words, once a client has opted to receive text for one program, they are opted in to receiving texts from other programs in which they participate, even if they have not expressly provided consent.

This System Change Request (SCR) will make updates related to appointment text messaging and texting consent functionality in CalSAWS, to support program-based text messaging. The following changes are included:

- Auto text opt-in page creation
- Appointment Application Programming Interface (API) updates
- Customer Contact Details API updates
- Text Campaigns batch job updates as listed in the section 2.4
- Opt-Out batch job for 'No Response' status and Domestic Violence tracked cases of text opt-in updates
- Pending GAIN Assignment batch for appointment scheduling updates
- Automated opt-in sweep job to update the opt-in status of program updates
- MarkDocumentReceived API updates
- GEN 102 appointment letter updates
- Notice of Missed Interview (NOMI) batch updates
- Text Notification Report updates

1.1 Current Design

Text messages are sent to primary applicants who are opted-in to text messaging and have a text messaging status of 'Verified.' CalSAWS currently attributes a customer's opt-in action to be for all text messages that the customer could receive from the system. There is no differentiation for a customer based on the program that the text message is generated for.

1.2 Requests

Update CalSAWS to support program level opt-in for text messages and utilize this new information when sending a text message to the customer through web services (APIs), batch jobs, and online pages.

1.3 Overview of Recommendations

1. Create Consortium controlled admin page to turn on and off automated verification opt-in batch functionality for the Medi-Cal program across all counties. The functionality will be activated at go-live.
2. DCR to move contact data to new table structure.
3. Update existing text campaigns to account for program level opt-in.
4. Contact Preference API to retrieve and save text opt-in per program.
5. Update the Automated Test Scripts for Contact Preference API.
6. Update the other applicable Text Campaign Sweep Jobs to support opt-in by program as mentioned in the section below "Update Batch Text Campaigns".
7. Update the Appointment API to accept and use the program in the request when creating an appointment.
8. Update the Automated Test Scripts for the Appointment API.
9. Update the trigger conditions for the CF 386 NOMI batch job PB00R541 to generate CF 386 NOMI only when an appointment is created for the CalFresh Program.
10. Update GEN 102 form field population for program to check the appointments created for the program.
11. Update the EBT Out of State Transaction (PI19F411), EBT Out of County Transaction (PI19F410) and Pending GAIN Assignment Batch (PB19M111) batch jobs to schedule the appointments by program.
12. Update No Response Opt-Out batch job (PB00C945) that auto opts-out customers if they have not verified their text opt-in within 3 days. Update job to opted-out pending verification on program-level.
13. Update Domestic Violence Opt-Out batch job (PB00C113) that auto opts-out customer from text notification due to being on a domestic violence case. Update job to opted-out both the overall text status and all program-level statuses.
14. Test the emergency text message campaigns with batch framework supporting program opt-in, ensuring they still work as originally designed.
15. Update the Text Notification Report to display the program the text notification is associated to.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically stated by this document.
2. The functionalities implemented in phase 1 SCR CA-279688 and phase 2 SCR CA-279707 will be turned ON along with the functionalities mentioned in this SCR.
3. A text message is sent in Spanish if the participant's written language preference is 'Spanish'. Otherwise, the text message is sent in English.
4. The current batch text notification process prevents duplicative texts from being sent to the same customer on the same day. The addition of program associations to text notifications will not affect this process.
5. 'Universal User' is a Project staff member with a County 90 login.
6. Other than GEN 102, forms generated through the Customer Scheduling Detail page are not affected.

7. SCR CA-248079 will address the creation of an On-Request Text Message Opt-In report.
8. The Appointment API changes will continue to support all existing universal requirements for all APIs such as request headers and exception handling.
9. Text notifications sent by batch processes will be sent during business hours only (Monday – Friday, 8:00 AM to 6:00 PM). Any text messages that cannot be sent before the end of a particular business day will be sent during business hours the following business day.
10. The update to Appointment API is a change to the currently supported versions, to add a new require parameter when creating an appointment. All ancillary applications will have to be updated if they utilize the API's ability to create new appointments. Otherwise, the ancillary application risks losing the ability to use the Appointment API.

2 RECOMMENDATIONS

2.1 Auto Text Opt-In

2.1.1 Overview

This SCR will create a new Auto Text Opt-In page that will allow users with the appropriate security rights to activate batch functionality across all counties that will automatically send verification texts to opt-in primary applicants into text messaging for Medi-Cal. The 'Active' status activates the Automated Opt-In batch job (see section 2.11) for all 58 counties in the entire CalSAWS system.

2.1.2 Auto Text Opt-In Mockup

Auto Text Opt-In

Program	Automated Text Opt-In Status	Status Date
Medi-Cal	Active	03/24/2025

Edit

Edit

Last Updated On 03/24/2025 8:00:00 AM By: 1234567

Figure 2.1.1 – Auto Text Opt-In Mockup (View mode for Universal User with AutoTextOptInEdit rights)

Auto Text Opt-In

Save and Return   Cancel

Program	Automated Text Opt-In Status	Status Date
Medi-Cal	Active ▾ / Active / Inactive	03/24/2025

Save and Return   Cancel

Last Updated On 03/24/2025 8:00:00 AM By: 1234567

Figure 2.1.2 – Auto Text Opt-In Mockup (Edit mode for Universal User with AutoTextOptInEdit rights)

Auto Text Opt-In

Program	Automated Text Opt-In Status	Status Date
Medi-Cal	Active	03/24/2025

Last Updated On 03/24/2025 8:00:00 AM By: 1234567

Figure 2.1.3 – Auto Text Opt-In Mockup (View mode for Universal User without AutoTextOptInEdit rights)

2.1.3 Description of Changes

1. Create a new Auto Text Opt-In page that will be used to activate batch functionality across all counties when updated and automatically send verification texts to opt-in primary applicants into text messaging for Medi-Cal.
    a. Display a table with the following columns (as shown in Figures 2.1.1 to 2.1.3.):
        i. Program
            1. This column will list the Medi-Cal program.
        ii. Auto Text Opt-In Status
            1. This column will indicate whether the auto opt-in functionality has been activated for the associated program.
            2. In edit mode, the column will contain a drop-down with the following options:
                a. Active
                b. Inactive
            3. By default, the value will be Active.
            4. In view mode, the column will contain the current opt-in status value for the associated program.
        iii. Status Date
            1. This column will indicate when the auto opt-in status was last updated for the associated program.
            2. By default, the value will be the SCR go-live date, 03/24/2025.
    b. The page will display an Edit button in view mode.
        i. This button will be protected by the AutoTextOptInEdit right and will not display for users without this right (as shown in Figure 2.1.3). Users that are not Universal Users will also not be able to access this page.
    c. The page will display a Save and Return button in edit mode.
        i. Clicking this button while in edit mode will save the Auto Text Opt-In page and return the user back to the Auto Text Opt-In page in view mode.
    d. The page will display a Cancel button in edit mode.
        i. Clicking this button will in edit mode will not update the Auto Text Opt-In page and return the user back to the Auto Text Opt-In page in view mode.
2. Create a new task navigation titled 'Auto Text Opt-In' for the page location.
    a. The Task Navigation will display in the Admin Global navigation under the Admin Local Navigation.
    b. The Task Navigation will display below the 'Emergency Text' Task Navigation.
    c. This page can be accessed by clicking the 'Auto Text Opt-in' task when the user has the proper security right.
3. The page will be protected by the AutoTextOptInView security right and only be viewable for Universal Users. It will not be visible without this right. Editing the page will be protected by the AutoTextOptInEdit security right. It will not be

editable by non-Universal Users or by Universal Users without the AutoTextOptInEdit security right.

2.1.4 Page Location

- **Global:** Admin
- **Local:** Admin
- **Task:** Auto Text Opt-In (Need to be a Universal User and have the AutoTextOptInView to view Task Navigation)

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
AutoTextOptInView	View Auto Text Opt-In Information.	Auto Text Opt In View, Auto Text Opt In Edit
AutoTextOptInEdit	Edit Auto Text Opt-In Information.	Auto Text Opt In Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Auto Text Opt In View	View Auto Text Opt-In Information.	Refer to Security Matrix
Auto Text Opt In Edit	Edit Auto Text Opt-In Information.	Refer to Security Matrix

Note: The Security Groups should be visible on the Select Security Groups page.

2.1.6 Page Mapping

Create page mapping to reflect new Auto Text Opt-In page.

2.1.7 Accessibility

This is a new page, and the page should be assessed for accessibility requirements and meet accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Appointment API

2.2.1 Overview

The Appointments API provides ancillary applications (example: Self-Service Portal) a way to access appointment data from CalSAWS. This API also allows ancillary applications to search for existing appointments, update an existing appointment status, and create new appointments.

CalSAWS is adding the ability to associate program types (ex: CalFresh and CalWORKs) to appointments. The Appointment API will be updated so that any appointment created through the API will require the new appointment to have associated program(s).

2.2.2 Description of Change

1. All changes described in this section are applicable to the following versions of the Appointment API:

API Versions
V2
V3

Note(s):

- Associating appointments to programs is related to a policy change for program-level texting notification opt-ins. The existing supported versions will be updated instead of new version being created. All ancillary applications will be required to update to meet any new requirements, otherwise they may lose the ability to utilize some or all parts of the Appointment API.
- CalSAWS traditionally only supports the two most recent versions of any API.
- The preexisting core difference between V2 and V3 is that V3 supports flexible appointment scheduling. Not all counties support flexible appointment scheduling.

2. The following is a table of all supported appointment programs that the Appointment API will use:

Appointment Programs
CalFresh
CalWORKs

Appointment Programs
GA/GR
GAGR ES/GROW
Medi-Cal
Other
WTW/REP

Table 2.2.2-1

3. Update the existing Appointment API's interface for creating new appointments. Appointments created through the API will include a parameter defining what program(s) are associated to the new appointment.

   a. Add the following field:

Parameter Name	Required Parameter	Data Type	Valid Values	Other Requirements
programList	Yes	String	Refer to Table 2.2.2-1	• The program parameter has a required minimum of one value that must be provided. • The program parameter has no maximum number of values it can be provided. • The program parameter cannot contain duplicates of the same program values

   b. The new parameter will have the following validations:

Validation Trigger Scenario	Validation Error Message	Message {parameter name}	Message {Reason}
The required programList (list) parameter has no values in it.	400 Bad Request. {parameter name} is invalid. {Reason}	programList	Request body parameter programList is invalid for {programList}
The required programList (list) parameter has duplicate values in the list. The same program is listed more than one time.			
The required programList (list) parameter has any value that does not match the supported appointment program types.			

2.2.3 Partner Integration Testing

Partner Testing Required with the following partners:
- All Counties

2.2.4 Counties Impacted

All Counties

2.3 Customer Contact Details API

2.3.1 Overview

The Customer Contact Details API is a RESTful API that retrieves the Self-Service Portal (SSP) user's contact information and preferences from CalSAWS and sends it to the SSP for the user to view. This action happens by calling the GET endpoint of the API. Additionally, it also stores the user's contact preferences that are collected through the SSP into CalSAWS. This action happens by calling the PUT endpoint of the API. This API will be updated to allow the customer to opt-in for text notifications by program and return the customer's text notification opt-in status by program.

2.3.2 Description of Change

1. Update the Customer Contact Details GET /customer/customerContactDetails/ endpoint to include the following response fields (Refer to the Interface documentation under the Supporting Documents section):

GET - Customer Contact Details - Response			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
calFreshOptIn	String (1 char min, 2 char max)	Text message opt-in for CalFresh program. Returns 'Y' if the number is opting-in for text notifications for CalFresh. Otherwise, returns 'N'	N/A
calWorksOptIn	String (1 char min, 2 char max)	Text message opt-in for CalWORKs program. Returns 'Y' if the number is opting-in for text notifications for CalWORKs. Otherwise, returns 'N'	N/A
mediCalOptIn	String (1 char min, 2 char max)	Text message opt-in for Medi-Cal program. Returns 'Y' if the number is opting-in for text	N/A

GET - Customer Contact Details - Response			
CALSAWS FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
		notifications for Medi-Cal. Otherwise, returns 'N'	
otherPgmOptIn	String (1 char min, 2 char max)	Text message opt-in for other programs. Returns 'Y' if the number is opting-in for text notifications for other programs excluding CalFresh, CalWORKs, and Medi-Cal. Otherwise, returns 'N'	N/A

2. Update the Customer Contact Details PUT /customer/customerContactDetails/Update endpoint to include the following request fields (Refer to the Interface documentation under the Supporting Documents section)::

PUT - Customer Contact Details - Request			
CALSAWS FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
calFreshOptIn	String (1 char min, 2 char max)	Text message opt-in for CalFresh program. Returns 'Y' if the number is opting-in for text notifications for CalFresh. Otherwise, returns 'N'	No
calWorksOptIn	String (1 char min, 2 char max)	Text message opt-in for CalWORKs program. Returns 'Y' if the number is opting-in for text notifications for CalWORKs.	No

PUT - Customer Contact Details - Request			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
		Otherwise, returns 'N'	
mediCalOptIn	String (1 char min, 2 char max)	Text message opt-in for Medi-Cal program. Returns 'Y' if the number is opting-in for text notifications for Medi-Cal. Otherwise, returns 'N'	No
otherPgmOptIn	String (1 char min, 2 char max)	Text message opt-in for other programs. Returns 'Y' if the number is opting-in for text notifications for other programs excluding CalFresh, CalWORKs, and Medi-Cal. Otherwise, returns 'N'	No

2.3.3 Execution Frequency

Real-time

2.3.4 Key Scheduling Dependencies

No impact to this section.

2.3.5 Counties Impacted

CalSAWS counties.

2.3.6 Category

No impact to this section.

2.3.7 Data Volume/Performance

N/A – No change is expected in the frequency of requests/responses.

2.3.8 Interface Partner

Self-Service Portal

2.3.9 Failure Procedure/Operational Instructions

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 Form Received - MarkDocumentReceived API

2.4.1 Overview

When a request is made to the MarkDocumentReceived API, an attempt is made to send a 'Form Received' text notification. The 'Form Received' text notification triggered from the API will be updated to check program associated to the received form and program-level text notification opt-in before sending a text notification.

2.4.2 Description of Change

1. Update the 'Form Received' text notification campaign to identify which program type(s) an individual text notification is associated to.
   a. Forms can potentially be associated to more than one program. Each individual form's program(s) will be identified by the form's customer report program type(s).
   b. One or more program(s) associated to the customer report will be marked 'Received'. The text notification should only be associated to the program(s) marked 'Received'.
      Notes:
      - The currently supported form types are variations of different customer reports. All customer reports have one or more program types directly associated to the form and each associated program has its own separately tracked status.
      - The currently supported form types are pre-existing and not changing as part of this SCR. See existing design for further details.
2. Update the process to check whether a customer is opted into the correct program-level opt-in to receive a text notification.
   a. An individual text notification may be associated to more than one program type. The customer only needs to have opted-in to at least one of the associated program types for the text notification to be sent.
   b. The below table describes what text notification opt-in program type aligns with which identified program type(s).

Text Opt-In Program Type	Campaign Program Type
CalFresh	CalFresh
CalWORKs	CalWORKs
Medi-Cal	Medi-Cal
Other	**Note**: Any program type not listed prior in this column

Notes:
- The customer's current program-level text notification opt-in status is found on the customer's Contact Detail page.
- If the text notification is associated to a CalWORKs/CalFresh combined concept (for example, a combination Redetermination Packet), it will be treated as both CalWORKs and CalFresh. If a customer opted-in to receive notifications from at least one of these programs, they will receive the text notification.

c. A customer is considered opted-in to receive text notifications for a program based on the Contact Detail page's Text Message Opt-In by Program subsection. The below table describes what the field values need to be to be considered opted-in for that program.

Field	Value
Program Opt-In	Yes
Program Text Message Status	Verified

Note: The program-level opt-in validation is in addition to other existing opt-in requirements.

3. See the below table for what action to perform, based on the customer's program opt-in status.

Scenario	Triggered Action
The customer did opt-in to receive a text message for the program type, on the Contact Detail page.	1) The text campaign will be sent. 2) Proceed to perform any already existing post-text actions that are required. (Ex: Adding a record to the Customer Contact History page for the sent text.)
The customer did not opt-in to receive texts for the program type.	1) The text message will not be sent to the customer. 2) Do not perform any further actions. Treat these instances the same as if the text campaign never identified the customer to send a text to.

4. Provide the Customer Contact History page with the program type(s) the text message was sent for. Please view the below table for more details about providing the program type(s) to the Customer Contact History page.

Scenario	Triggered Action
1) A single sent text message is associated to only one program type.	1) Provide the Customer Contact History page with the program type to display on the page.
1) A single sent text message is associated to multiple different programs.	1) Provide the Customer Contact History page with a list of each program associated to the sent text message. • The page will not be provided any duplicates of individual program types.

Note: Other processes initiated by the MarkDocumentReceived API will be unaffected if a 'Form Received' text notification is not sent or does not send.

2.4.3 Partner Integration Testing

N/A

2.4.4 Execution Frequency

No change

2.4.5 Key Scheduling Dependencies

No change

2.4.6 Counties Impacted

All counties

2.4.7 Category

No change

2.4.8 Data Volume/Performance

No change

2.4.9 Interface Partner

CalSAWS Imaging Solution

2.4.10 Failure Procedure/Operational Instructions

No change

2.5 Update Batch Text Campaigns

2.5.1 Overview

There are multiple text message campaigns that send a text to customers. Customers receive the text messages only when specific scenarios occur to trigger the message.

Existing campaigns to be updated are:
- Redetermination with Appointment Sent
- Redetermination without Appointment Sent
- SAR 7 Not Received
- CalWORKs Redetermination Packet Not Received
- CalFresh Recertification Packet Not Received
- CalWORKs/CalFresh Recertification Packet Not Received
- SAR 7 Not Received (NA 960X Sent)
- SAR 7 Not Received (Balderas Sent)
- SAR 7 Sent
- QR 7 Due
- GR Non-compliance
- GROW Non-compliance
- MC Packet Sent
- Verification Request Sent
- MC Redetermination Form Not Received
- Notice of Action Sent
- WTW Form Sent
- Upcoming WTW Activity
- Medi-Cal is Auto Renewed
- General Relief Expiration Reminder Text

2.5.2 Description of Change

1. Update all the text notification campaigns in Table 2.4.1 in the following ways:
   a. Capture the program type(s) (ex: CalFresh, CalWORKs, etc.) associated to each individual message to be sent to a customer. Refer to Table 2.4.1's "Program Source" column for where each campaign derives program type information from.

      Note: See SCR CA-279707 for the recommendation about how program type information is used to verify the customer's program-level opt-in.

Campaign Name	Batch Job Number	Program Source
Redetermination with Appointment Sent	PO00V105	The combined list of programs from the following pages: • Customer Reporting Detail • Appointment Detail **Notes**: • Appointments created before go-live will have no programs associated to them. These will be treated as "all programs" appointments. • If the RE and the appointment include the same program, only one copy of the program is retained.
Redetermination without Appointment Sent	PO00V107	The list of programs from Customer Reporting Detail page.
SAR 7 Not Received	PO00V109	The list of programs from Customer Reporting Detail page.
CalWORKs Redetermination Packet Not Received	PO00V111	The list of programs from Customer Reporting Detail page.
CalFresh Recertification Packet Not Received	PO00V113	The list of programs from Customer Reporting Detail page.
CalWORKs/CalFresh Recertification Packet Not Received	PO00V115	The list of programs from Customer Reporting Detail page.
SAR 7 Not Received (NA 960X Sent)	PO00V117	The program(s) that the form was sent for, from the Program Detail page.
SAR 7 Not Received (Balderas Sent)	PO00V119	The program(s) that the form was sent for, from the Program Detail page.

SAR 7 Sent	PO00V125	The list of programs from Customer Reporting Detail page.
QR 7 Due	PO00V127	The list of programs from Customer Reporting Detail page.
GR Non-compliance	PO00V129	The program that is non-compliant, from the Program Detail page.
GROW Non-compliance	PO00V131	The program that is non-compliant, from the Program Detail page.
MC Packet Sent	PO00V133	The list of programs from Customer Reporting Detail page.
Verification Request Sent	PO00V135	The program that the form was sent for, from the Program Detail page.
MC Redetermination Form Not Received	PO00V145	The list of programs from Customer Reporting Detail page.
Notice of Action Sent	PO00V151	The program that the form was sent for, from the Program Detail page.
WTW Form Sent	PO00V193	The program that the form was sent for, from the Program Detail page.
Upcoming WTW Activity	PO00V197	The Program Detail page for the program linked to the activity.
Medi-Cal is Auto Renewed	PO00V199	The Program Detail page for the program running EDBC.
General Relief Expiration Reminder Text	PO00V211	The program that the form was sent for, from the Program Detail page.

Table 2.4.1 – Batch Text Notification Campaigns

2. Update the Redetermination with Appointment Sent text campaign by adding the below listed requirements.
   a. Send a text notification to the individual if all the following conditions have been met:

      i. The RE program type is at least one of the following, which is identified by the form's customer report program type(s):

Program
CalWORKs
CalFresh

i. And the appointments identified by current design include at least one of the following programs:

Program
CalWORKs
CalFresh

Notes:

o The above describes recommendations in addition to all existing conditions for the text notification campaign. It does not replace existing conditions.

o The RE program(s) and the program(s) that an appointment is associated to do not need to be the same program(s).

- Examples of when a text notification will be sent include but are not limited to:
  - An RE associated to CalWORKs only and an appointment associated to CalFresh only.

  - An RE associated to CalWORKs only and an appointment associated to CalFresh and Medi-Cal.

  - An RE associated to CalFresh and Medi-Cal and an appointment associated to CalWORKs and GA/GR.

3. Update the Redetermination without Appointment Sent text campaign by adding the below listed requirements.
   a. Send a text notification to the individual if all the following conditions have been met:

   i. The RE program type is at least one of the following, which is identified by the form's customer report program type(s):

Program
CalWORKs
CalFresh

   ii. And the appointments identified by current design **do not** include any of the following program(s):

Program
CalWORKs
CalFresh

Note:
- o The above describes recommendations in addition to all existing conditions for the text notification campaign. It does not replace existing conditions.

2.5.3 Execution Frequency

No change

2.5.4 Key Scheduling Dependencies

No change

2.5.5 Counties Impacted

All counties

2.5.6 Category

No change

2.5.7 Data Volume/Performance

No change

2.5.8 Failure Procedure/Operational Instructions

No change

2.6 No Response Opt-Out Batch Job

2.6.1 Overview

The No Response Opt-Out batch job (PB00C945) changes the text message opt-in status to 'Opt-Out' with a text message status of 'No Response' when the most recent verification text message sent to a customer was 3 or more days ago from the day the batch job runs, and the text message status has remained 'Pending Verification'. The batch job will be updated to opt out a person's program-level text notification opt-in.

2.6.2 Description of Change

1. Update the process to opt-out program-level opt-in statuses, if the program's verification message was sent 3 or more days ago from the day the batch job runs.

   a. Add a process to identify which opt-in verification text notification is associated to which program-level 'Pending Verification' status. An opt-in verification text notification is associated to a 'Pending Verification' status if it meets all the following criteria:
      i. On the Contact Detail page, there is at least one program opt-in status of 'Pending Verification'.
      ii. On the Customer Contact History page, there is a verification text notification that was sent after the Status Date on the Contact Detail page.
         1. The Reason column has a value of 'Phone Number Verification'.
         2. The Date/Time column is the most recent for that program.
         3. The Date/Time value is 3 or more days ago from the day the batch job runs.
         4. The Program column includes the same program identified on the Contact Detail page.
         5. The Date/Time column has a value for the same day or later than the identified Contact Detail page Status Date.
   b. If a Customer Contact History record has been matched to a Contact Detail record (see above), perform the following actions:
      i. Update the following Contact Detail page fields to the values described in the below table.

Field	New Value
Program Opt-In	No
Program Text Message Status	No Response
Status Date	**Note:** The current date, when the status change took place

2. Modify the existing process for opting out phone numbers from text notifications.
   a. The above-described new process of identifying and opting-out programs will occur prior to determining if the phone number will be opted-out.

   b. Override all preexisting processes for identifying what phone numbers to opt-out. Do **not** opt-out the phone number from text notifications if there are remaining program-level opt-ins with a status of one of the following:

   Program Text Message Status

| Pending Verification |
| Verified |

c. Opt-out the phone number from text notifications if there are **no** remaining program-level opt-ins with a status of one of the following:

Program Text Message Status
Pending Verification
Verified

d. If the phone number should be opted-out, update the following Contact Detail page fields to the values described in the below table.

Field	New Value
Text Message	Opt-Out
Text Message Status	No Response

2.6.3 Execution Frequency

No change

2.6.4 Key Scheduling Dependencies

No change

2.6.5 Counties Impacted

All counties

2.6.6 Category

No change

2.6.7 Data Volume/Performance

No change

2.6.8 Failure Procedure/Operational Instructions

No change

2.7 Domestic Violence Opt-Out Batch Job

2.7.1 Overview

The Domestic Violence Opt-Out batch job (PB00C113) identifies Domestic Violence cases. Customers on the identified cases are opted out from receiving text notifications. The batch job will be updated to also opt out a person's program-level text notification opt-ins.

2.7.2 Description of Change

1. Update the process when opting out a customer's phone number. In addition to opting out the phone number, opt out **all** program-level text notification opt-ins.

    a. For all programs on the Contact Detail page, update the following fields to the values described in the below table.

Field	New Value
Program Opt-In	No
Program Text Message Status	Opted-Out
Status Date	**Note:** The current date, when the status change took place

    Note: The changing of the program-level field values is in addition to all existing triggered processes. It does not replace the existing processes.

2.7.3 Execution Frequency

No change

2.7.4 Key Scheduling Dependencies

No change

2.7.5 Counties Impacted

All counties

2.7.6 Category

No change

2.7.7 Data Volume/Performance

No change

2.7.8 Failure Procedure/Operational Instructions

No change

2.8 EBT Out of State Transaction Batch

2.8.1 Overview

EBT out of State Transaction Batch job (PI19F411) processes the EBT out of state transactions. Based on the program code, it creates appointments and must consider program-specific appointments moving forward.

2.8.2 Description of Change

1. When scheduling appointments, program details should be included in the appointments.
   a. For General Assistance/General Relief program type, the batch job will create appointments with option 'GA/GR'.
   b. For CalWORKs program type, the batch job will create appointments with option 'CalWORKs'.
   c. For CalFresh program type, the batch job will create appointments option 'CalFresh'.
   d. For Refugee Cash Assistance and CAPI program type, the batch job will create appointments with option 'Other'.

2. The batch job checks for existing appointments before attempting to schedule an appointment. Update the process that determines if a new appointment should be created.

   Note:
   - Other criteria defining an existing appointment is not changing as part of this SCR. See current functionality for clarification on the criteria for an existing appointment.
   - Appointments that are created prior to Phase 3 deployment will be considered an appointment for all programs. The batch job will not attempt to schedule an additional appointment if an appointment for all programs exists.

2.8.3 Execution Frequency

No change

2.8.4 Key Scheduling Dependencies

No change

2.8.5 Counties Impacted

Los Angeles

2.8.6 Category

No change

2.8.7 Data Volume/Performance

N/A

2.8.8 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.)

2.9 EBT Out of County Transaction Batch

2.9.1 Overview

EBT Out of County Transaction Batch job (PI19F410) processes the EBT out of county transactions. Based on the program code, it generates appointments for General Assistance/General Relief program.

2.9.2 Description of Change

When scheduling appointments, program details should be included in the appointments. For General Assistance/General Relief program type, the batch job will create appointments with option 'GA/GR'.

2.9.3 Execution Frequency

No change

2.9.4 Key Scheduling Dependencies

No change

2.9.5 Counties Impacted

Los Angeles

2.9.6 Category

No change

2.9.7 Data Volume/Performance

N/A

2.9.8 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.

2.10 Pending GAIN Assignment Batch

2.10.1 Overview

Pending GAIN Assignment Batch (PB19M111) creates appointments. It will be updated to associate appointments to program types.

2.10.2 Description of Change

1. Update Pending GAIN Assignment Batch (PB19M111).
   a. 'Appraisal Appointment' appointments created by this batch job will have the following program type:

Program Type
WTW/REP

   b. 'Cal-Learn Orientation' appointments created by this batch job will have the following program type:

Program Type
Other

2.10.3 Execution Frequency

No change

2.10.4 Key Scheduling Dependencies

No change

2.10.5 Counties Impacted

Los Angeles

2.10.6 Category

No change

2.10.7 Data Volume/Performance

No change

2.10.8 Failure Procedure/Operational Instructions

No change

2.11 Automated Opt-In Batch Job

2.11.1 Overview

CalSAWS's current design does not support automated opt-ins for text notifications.

CalSAWS will be updated to support automated opt-ins for text notifications for Medi-Cal. A new batch job will be created to identify Medi-Cal customers eligible for automated opt-in.

2.11.2 Description of Change

1. Automatically opt-in a customer for Medi-Cal text notifications if Medi-Cal is 'Active' on the Auto Text Opt-In page and they meet all the following criteria:

    a. The customer meets all the criteria for at least one of the following scenarios:

        i. Scenario 1: Newly Approved Applications
            1. The customer has a Medi-Cal application that meets the following criteria on the Person History page in the Person Application History section:
                a. The application had an initial action that meets the following criteria:
                    i. The initial action is the following:

Action
Approval

                    ii. The initial action occurred between the prior batch run and the current run.

                    Note: An initial action of an application is the original approval or denial of an application that takes place after a 'Pending' action.

        ii. Scenario 2: Rescinded Approvals
            1. The customer has a Medi-Cal application that meets the following criteria on the Person History page in the Person Application History section:
                a. The application had a rescind action that meets the following criteria:
                    i. rescind action is one of the following:

Action
Rescind Approved (Denial)
Rescind Approved (Discontinued)

                    ii. The rescind action occurred between the prior batch run and the current run.

                    Note: An rescind action is when the application's denial or discontinuance is reversed.

iii. Scenario 3: Primary Applicant Changes
   1. The customer meets the following criteria:
      a. The customer is on a Medi-Cal program.
      b. The customer became the primary applicant on the Medi-Cal program between the prior batch run and the current batch run.

      Note: CalSAWS current design supports a worker being able to override historical primary applicant information. If this occurs, it is not possible to identify changes in primary applicants.

b. And the customer also meets all the following criteria:
   i. The customer's Medi-Cal text notification status is not any of the following statuses:

Program Text Message Status
Pending Verification
Verified

   ii. The customer has a phone number of at least one of the following types:
      1. Cell
      2. Main
      3. Home
   iii. The customer is the current primary applicant on the Medi-Cal program.
   iv. The customer's Medi-Cal program is currently 'Active'.
   v. The customer is not associated to an 'Active' or 'Pending' Foster Care, AAP, or Kin-GAP program.
   vi. The customer is not linked to a Minor Consent case. A Minor Consent case is a Medi-Cal program with an aid code of 7M, 7N, 7P, or 7R.
   vii. The customer does not have a Cash or Medi-Cal program with an aid code tied to Foster Care, AAP, or Kin-GAP. See Table 2.10.1 for a list of aid codes tied to Foster Care, AAP, or Kin-GAP.

Aid Code	Aid Code Description
03	Adoption Assistance – Federal
04	Adoption Assistance – State Only
05	Seriously Emotionally Disturbed – Non-Emergency As
06	Federal AAP Cash Subsidy from Out-of-State
07	Adoption Assistance – Extended – Federal
2P	ARC Only
2R	ARC Only for NMD
2S	ARC with Federal CalWORKs
2T	ARC with State CalWORKs
2U	ARC with State CalWORKs for NMDs
40	AFDC – Foster Care (State Only)

42	AFDC – Foster Care (Federal)
43	Foster Care Extended (State) beyond age 18
45	County Funded Foster Care
46	Federally Funded FC Benefits from Out-of-State
49	Foster Care Extended (Federal) beyond age 18
4A	Aid to Adoptions – Out of State Adoption
4E	Presumptive Eligibility for Former Foster Care Children
4F	Kin-GAP (State Only)
4G	Kin-GAP (State Only) for children beyond age 18 due to a disability
4H	Foster Care Child in California Work Opportunity and Responsibility to Kids
4L	1931(b) Foster Care
4S	Kin-GAP Extended (Federal)
4T	Kin-GAP (Federal)
4W	Kin-GAP Extended (State)
5K	Emergency Assistance – Foster Care
5L	Emergency Caregiver – Emergency Assistance Ineligible – Foster Care

Table 2.10.1 – Aid Codes Tied to Foster Care, AAP, or Kin-GAP

2. From the prior identified opt-in population (see above), perform the following actions:

   a. If the individual's phone number is not already 'Verified' or 'Pending Verification' for text notifications, the text notification opt-in status on the Contact Detail page for the phone number should be changed to the following:

Field	New Value
Text Message Status	Pending Verification

   b. The program opt-in status for Medi-Cal should be changed to the following:

Field	New Value
Program Opt-In	Yes
Program Text Message Status	Pending Verification
Status Date	**Note:** The current date, when the status change took place

   c. Prepare a pending opt-in verification text notification to be sent to the customer's phone number.

i. Select the phone number with the highest priority phone number type. The order of phone number type priority is as follows, from highest priority to lowest priority:
1. Cell
2. Main
3. Home

Notes:
- The pending opt-in verification text notification to be sent to the customer is the same text message that is currently triggered through the Contact Detail page. Existing opt-in and opt-out processes apply, depending on the response or non-response from the participant.
- Text notifications will be sent during business hours only (Monday – Friday, 8:00 AM to 6:00 PM). For example, customers identified for auto opt-in text notifications on a Friday would not receive auto opt-in text notifications until the following Monday.

2.11.3 Execution Frequency

Daily (Monday – Saturday)

2.11.4 Key Scheduling Dependencies

After PB00C113 (Domestic Violence Opt-Out batch job) and before PO00V200 (text message sweep load balancer).

2.11.5 Counties Impacted

All counties

2.11.6 Category

Core

2.11.7 Data Volume/Performance

~200,000 records per month

2.11.8 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.)

2.12 Real-Time Text Notifications – Auto Opt-In Verifications

2.12.1 Overview

Opt-in verification texts for auto opt-in are sent through a batch job, which are only sent during business hours. If a customer responds with an opt-in or opt-out keyword, any pending opt-in verification text that has yet to be sent will not be sent.

2.12.2 Description of Change

1. Update the opt-in and opt-out processes triggered by a customer keyword response. If a customer responds with an opt-in or opt-out keyword and there is a pending opt-in verification text that has not yet been sent to the customer, the pending opt-in verification text should not be sent.
2. Create new status codes in category 10614. If there is a pending opt-in verification text and the customer opts in prior to the text notification being sent, update the status of the text notification to indicate that it will not be sent due to customer opt-in. If there is a pending opt-in verification text and the customer opts out prior to the text notification being sent, update the status of the text notification to indicate that it will not be sent due to customer opt-out.
   Technical Note: This status is back-end only.

   Notes:
   - The above is in addition to all other existing processes. It does not replace the existing process.
   - Opt-in and opt-out keywords and supported language equivalents are preexisting and not being updated in this SCR.

2.12.3 Partner Integration Testing

N/A

2.12.4 Execution Frequency

N/A

2.12.5 Key Scheduling Dependencies

N/A

2.12.6 Counties Impacted

All counties

2.12.7 Category

N/A

2.12.8 Data Volume/Performance

N/A

2.12.9 Interface Partner

N/A

2.12.10   Failure Procedure/Operational Instructions

N/A

2.13 Test Only – Emergency Text

2.13.1 Overview

Counties can create custom text messages and specify program(s) to limit the target audience of the text message. When an Emergency Text is sent to a customer, there is no record added to the Customer Contact History page.

The design of the Emergency Text campaign is not being changed by this SCR. It will not check program-level opt-ins. Emergency Text campaign will be tested to verify that there is not any unintentional impact by other batch text notification process changes.

2.13.2 Description of Change

1. Test the Emergency Text notification campaign. Validate the campaign still functions as per its current design.

2.13.3 Execution Frequency

No change

2.13.4 Counties Impacted

All counties

2.13.5 Category

No change

2.13.6 Data Volume/Performance

No change

2.13.7 Failure Procedure/Operational Instructions

No change

2.14 Correspondence - Update GEN 102 Program Variable Population

2.14.1 Overview

SCR CA-279688 updated the Customer Appointment Detail page to indicate the programs for the appointment scheduled on a new section titled "Program Information". Update the GEN 102 Appointment Letter Program Variable Population to check the appointments Created for the Program.

State Forms: GEN 102
Programs: Multiple
Attached Forms: N/A
Forms Category: Forms
Editable: Yes
Visibility: All Counties
Current Languages (13)**:** English, Armenian, Arabic, Cambodian, Chinese, Farsi, Tagalog, Hmong, Korean, Lao, Russian, Spanish, Vietnamese

2.14.2 Discerption of Changes

Update the GEN 102 form to adjust the alignment of the program checkboxes as indicated in the mockup. For reference, refer to supporting document #5.

2.14.3 Form Verbiage

There is no change the form verbiage.

2.14.4 Form Variable Population

Update the GEN 102 Appointment Letter Program Variable Population to check the appointments Created for the Program.

Variable Name	Population	Formatting	Editable/ Field Type	Template Repository Population	Populates with Form Generation	Populates in Packet
CalFresh Checkbox	Checked if the 'CalFresh' program is selected on the Customer Appointment Detail Page under Program	--	Y Standard Checkbox	N	Y	Y

	Information Section.					
CalWORKs Checkbox	Checked if the 'CalWORKs' program is selected on the Customer Appointment Detail Page under Program Information Section.	--	Y Standard Checkbox	N	Y	Y
Other Checkbox	Checked if the 'GA/GR' or 'GAGR ES/GROW' or 'Medi-Cal' or 'WTW/REP' programs are selected on the Customer Appointment Detail Page under Program Information Section.	--	Y Standard Checkbox	N	Y	Y
Other Programs	Populate the field with the programs selected on the Customer Appointment Detail Page under the Program Information section, excluding **CalFresh** and **CalWORKs**. The programs should be listed, separated by commas. For Example: if the 'GA/GR', 'GAGR ES/GROW', 'Medi-Cal' and 'WTW/REP' programs are selected, the field	-	Y Standard Text	N	Y	Y

should be populated as: GA/GR, GAGR ES/GROW, Medi-Cal, WTW/REP.					

2.14.5 Form Generation Conditions

There is no change in the Form Generation Conditions.

2.15 Correspondence - Update Notice of missed interview Form CF 386 Batch Generation Conditions

2.15.1 Overview

The CF 386 CalFresh NOMI is used to alert the customer that they have missed their CalFresh interview appointment and informs them of the due date to complete their interview or their CalFresh benefits will be denied or discontinued.

State Form: CF 386 (2/14)
Current Programs: CalFresh and CalWORKs
Current Forms Category: NOA
Form Mockups/Examples: No change to the form template/verbiage.
Existing Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese

2.15.2 Form Verbiage

There is no change to the form verbiage.

2.15.3 Form Variable Population

There is no change to the form variable population.

2.15.4 Form Generation Conditions

Currently PB00R541 batch job triggers CF 386 Notice of Missed Interview (NOMI) for households who missed their intake interview,
when,
1. CalFresh program is Pending and,
2. General appointment type with Telephone interview intake
   or
   Intake interview type and,

3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled'.

Or when,

1. CalFresh program is Active and,
2. General appointment type with Telephone interview intake
   or
   Intake interview type and,
3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled' and,
4. Appointment date is within the redetermination period and,
5. No other above listed appointments created with in the current redetermination period.

Or for households who missed their redetermination interview, when,

1. CalFresh program is Active and,
2. General appointment type with Telephone interview recertification
   or
   Telephone CW/CF RE Interview, Re-Evaluation CW/CF Interview or Re-Evaluation Interview types and,
3. Appointment status is 'No Show', 'Scheduled' or 'Rescheduled' and,
4. Appointment date is,

   within the redetermination due month,
   Or,
   within the prior month of redetermination due month.

2.15.4.1 Description of Changes

Along with the current form generation condition add the below new condition.

New Condition to be added:

> Customer appointment is scheduled for the CalFresh Program by selecting the CalFresh program checkbox under the Program Information Section on the Customer Appointment Detail Page.

2.16 Text Notification Report

2.16.1 Overview

The Text Notification Report is a monthly scheduled report that provides summary and detailed backup information for outbound text message notifications. This report will be updated to add a column displaying the programs the text notification is associated to.

2.16.2 Text Notification Report Mockup

CalSAWS Text Notification Report

San Bernardino
Run Date: OCT-02-24 03:10 PM
Report Month: 09/2024

					Total:	10

Case Number	Case Name	Person Name	English/Spanish	Text Status	Text Date	Text Reason
0019058	Case Name	Person Name	English	Sent	09/27/2024	Text Notification SAR 7 Sent
0050193	Case Name	Person Name	English	Sent	09/18/2024	Appointment Reminder
0068375	Case Name	Person Name	English	Sent	09/13/2024	Medi-Cal is Auto Renewed
0092936	Case Name	Person Name	English	Sent	09/27/2024	Text Notification SAR 7 Sent
0102982	Case Name	Person Name	English	Sent	09/18/2024	Appointment Reminder
0102982	Case Name	Person Name	English	Sent	09/18/2024	Text Notification CW/CF RE Sent
0105507	Case Name	Person Name	English	Sent	09/18/2024	Text Notification CW/CF RE Sent
0110491	Case Name	Person Name	English	Sent	09/16/2024	Text Notification MC RE Sent
0127396	Case Name	Person Name	English	Sent	09/13/2024	Medi-Cal is Auto Renewed
0136408	Case Name	Person Name	English	Sent	09/04/2024	Text Notification Customer Report Received

Figure 2.16.2.1 – Text Notification Report Details Sheet Before Addition of Program Column

CalSAWS Text Notification Report

San Bernardino
Run Date: OCT-02-24 03:10 PM
Report Month: 09/2024

					Total:	10

Case Number	Case Name	Person Name	English/Spanish	Text Status	Text Date	Text Reason	Program
0019058	Case Name	Person Name	English	Sent	09/27/2024	Text Notification SAR 7 Sent	CF
0050193	Case Name	Person Name	English	Sent	09/18/2024	Appointment Reminder	CF, CW, MC
0068375	Case Name	Person Name	English	Sent	09/13/2024	Medi-Cal is Auto Renewed	MC
0092936	Case Name	Person Name	English	Sent	09/27/2024	Text Notification SAR 7 Sent	CF
0102982	Case Name	Person Name	English	Sent	09/18/2024	Appointment Reminder	CF, CW, MC, Other
0102982	Case Name	Person Name	English	Sent	09/18/2024	Text Notification CW/CF RE Sent	CF, CW
0105507	Case Name	Person Name	English	Sent	09/18/2024	Text Notification CW/CF RE Sent	CF, CW
0110491	Case Name	Person Name	English	Sent	09/16/2024	Text Notification MC RE Sent	MC
0127396	Case Name	Person Name	English	Sent	09/13/2024	Medi-Cal is Auto Renewed	MC
0136408	Case Name	Person Name	English	Sent	09/04/2024	Text Notification Customer Report Received	-

Figure 2.16.2.2 – Text Notification Report Details Sheet After Addition of Program Column

CalSAWS	Text Notification Report			
San Bernardino				
Run Date: OCT-02-24 03:10 PM				
Report Month: 09/2024				
Sent Text Summary				
Reason	**Total**			
Appointment Reminder	2			
CF RE Discontinuance	0			
CW RE Discontinuance	0			
CW/CF Discontinuance	0			
Medi-Cal is Auto Renewed	2			
Missed Appointment	0			
Missing SAR 7	0			
Notice of Action Sent	0			
Phone Number Verification	0			
Text Notification Customer	0			
Text Notification Customer	0			
Text Notification Customer	1			
Text Notification CW/CF RE	2			
Text Notification MC RE Sent	1			
Text Notification SAR 7 Sent	2			
Text Notification Verification	0			
Upcoming WTW Activity	0			
WTW Form Sent	0			
Total	**10**			
Undeliverable Text Summary				
Reason	**Total**			
Undeliverable	0			

Figure 2.16.2.3 – Text Notification Report Summary Sheet Before Adjustment of Reason Column Width

CalSAWS	Text Notification Report			
San Bernardino				
Run Date: OCT-02-24 03:10 PM				
Report Month: 09/2024				
Sent Text Summary				
Reason	**Total**			
Appointment Reminder	2			
CF RE Discontinuance	0			
CW RE Discontinuance	0			
CW/CF Discontinuance	0			
Medi-Cal is Auto Renewed	2			
Missed Appointment	0			
Missing SAR 7	0			
Notice of Action Sent	0			
Phone Number Verification	0			
Text Notification Customer Report Complete	0			
Text Notification Customer Report Incomplete	0			
Text Notification Customer Report Received	1			
Text Notification CW/CF RE Sent	2			
Text Notification MC RE Sent	1			
Text Notification SAR 7 Sent	2			
Text Notification Verification Request Sent	0			
Upcoming WTW Activity	0			
WTW Form Sent	0			
Total	**10**			
Undeliverable Text Summary				
Reason	**Total**			
Undeliverable	0			

Figure 2.16.2.4 – Text Notification Report Summary Sheet After Adjustment of Reason Column Width

2.16.3 Description of Change

1. Update the Text Notification Report to add a new 'Program' column on the 'Details' sheet, that will display the program(s) associated to the text message notification.

Column Name	Column Description
Program	This is the program(s) associated to the text message notification that was sent to the customer. The text message notification can be associated to one or more programs.

	The value for this column will display as the program code of the program or 'Other'. The value of 'Other' can occur under any of the following conditions: • On the Contact Detail page, the 'Other' program was selected to opt-in to receive text notifications instead of the additional options of o CalFresh o CalWORKs o Medi-Cal as per Phase 2 SCR CA-279707. • When creating a new customer appointment, 'Other' is selected as the associated program instead of the additional options of o CalFresh o CalWORKs o GA/GR o GAGR ES/GROW o Medi-Cal o WTW/REP as per Phase 1 SCR CA-279688. If the text message notification is associated to multiple programs the program code values will be displayed in a comma separated list in alphabetical order. The value of 'Other' will also be included in this list if exists. For example: CF, MC, Other If the text message notification is not associated to a program or 'Other' then the blank value will be denoted by '-'. **Tech Notes:** SELECT CONTACT_LOG_PGM.PGM_CODE WHERE CONTACT_LOG_PGM.CONTACT_LOG_ID = CONTACT_LOG.ID The value of 'Other' occurs when CONTACT_LOG_PGM.OTHER_IND = 'Y'

2. Update the 'Details' sheet to account for the shift of the 'Total' field to align with the addition of the new 'Program' column. See **Figure 2.16.2.2** for reference.

3. Update the 'Summary' sheet to expand the width of the 'Reason' column to adjust the display of longer 'Reason' column values. See **Figure 2.16.2.4** for reference.

2.16.4 Report Location

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

2.16.5 Counties Impacted

All counties will be impacted by the changes outline in this section.

2.16.6 Security Updates

1. Security Rights

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

2. Security Groups

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

2.16.7 Report Usage/Performance

No significant change in report usage or performance is expected.

2.17 Text Message Status Data Change

2.17.1 Overview

This SCR will process a data change to move existing contact text message data to the new table structure.

2.17.2 Description of Change

1. Process a data change to move existing contact text message data to new table structure.
   a. Customers that currently have a phone number with a text message value of 'Opt-In' will have the Program Opt-In values set to 'Yes' for all Program options (CalFresh, CalWORKs, Medi-Cal, Other).
      i. Opted-In customers that currently have a text message status of 'Verified' will have the Program Opt-In Status value set to 'Verified'
      ii. Opted-In customers that currently have a text message status of 'Pending Verification' will have the Program Opt-In Status value set to 'Pending Verification.
      iii. The initial Status Date value will be set based on the date the phone number record was last updated.
   b. Update Customer Contact History records for the verification texts sent to customers that are 'Pending Verification' at the time the data change is processed.
      i. The Program field will be updated to indicate all Program options (CalFresh, CalWORKs, Medi-Cal, Other).

      Note: When multiple records exist for a customer, only the most recent Customer Contact History record for the customer should be updated.

   Technical Note: This data change should be applied at go-live, prior to other data changes.

2.17.3 Estimated Number of Records Impacted/Performance

7,258,315 records

2.18 One-Time Automated Opt-In for Medi-Cal

2.18.1 Overview

Customers currently active on a Medi-Cal program who have not opted-in or opted-out of text notifications previously will be prompted to opt-in to text notifications for Medi-Cal.

2.18.2 Description of Change

1. Create a data change to identify the list of customers who will be sent an opt-in verification text notification. Customers should meet all the following criteria:
   a. The customer is the current primary applicant on a Medi-Cal program.
   b. The Medi-Cal program is currently 'Active'.
   c. All phone numbers associated to the customer have a blank 'Text Message Status'.
   d. The customer has a phone number with one of the following types:
      i. Cell
      ii. Main
      iii. Home
   e. The customer is not linked to any case with an active 'Domestic Violence' case flag and/or an existing 'Domestic Violence' confidentiality record and their household status for the case is 'In the Home'.
   f. The customer is not associated to an 'Active' or 'Pending' Foster Care, AAP, or Kin-GAP program.
   g. The customer is not linked to a Minor Consent case. A Minor Consent case is a Medi-Cal program with an aid code of 7M, 7N, 7P, or 7R.
   h. The customer does not have a Cash or Medi-Cal program with an aid code tied to Foster Care, AAP, or Kin-GAP. See Table 2.10.1 for a list of aid codes tied to Foster Care, AAP, or Kin-GAP.
2. For the prior identified opt-in population (see above), perform the following actions:
   a. Select the phone number with the highest priority phone number type. The order of phone number type priority is as follows, from highest priority to lowest priority:
      1. Cell
      2. Main
      3. Home
   b. Update the text notification opt-in status on the Contact Detail page for the phone number to the following:

Field	New Value
Text Message Status	Pending Verification

   c. Update the program opt-in status for Medi-Cal to the following:

Field	New Value
Program Opt-In	Yes

Program Text Message Status	Pending Verification
Status Date	**Note:** The current date, when the status change took place

    d. Prepare a pending opt-in verification text notification to be sent to the customer's phone number.

        Notes:
- The pending opt-in verification text notification to be sent to the customer is the same text message that is currently triggered through the Contact Detail page. Existing opt-in and opt-out processes apply, depending on the response or non-response from the customer.
- Text notifications will be sent during business hours only (Monday – Friday, 8:00 AM to 6:00 PM).

Technical Notes:
- This data change should be applied after the data change to move existing contact text message data to the new, program-specific table structure, which is detailed earlier in this document.
- This data change should be applied at go-live.

2.18.3 Data Volume/Performance

~1 million records

2.19 Update Code Category 2799

2.19.1 Overview

Program-specific logic is not applicable in production until Phase 3 release date. Update the back-end date to align with Phase 3 release date.

2.19.2 Description of Change

1. Update 'Text Messaging by Program Go-Live' record in code category 2799, added in SCR CA-279688, to align with Phase 3 release date.

2.20 Automated Regression Test

2.20.1 Overview

Create new automated regression test scripts to verify the basic functionality of the new Auto Text Opt-In page, the page mapping entries for this page, and the changes to the two Customer Contact Details API endpoints.

2.20.2 Description of Change

1. Create regression scripts to verify that a Universal User can navigate to the Auto Text Opt-In page and view, edit, and cancel updates to the Medi-Cal opt-in status.
2. Create regression scripts to verify that the task nav link for the Auto Text Opt-In page is not visible to a county-specific user.
3. Create regression scripts to verify that a page mapping entry exists for each applicable field on the Auto Text Opt-In page.
4. Create (or update existing) regression scripts to verify that when valid requests are sent to the Customer Contact Details API GET endpoint, the responses include opt-in status values for each program/category.
5. Create regression scripts to verify that valid requests sent to the Customer Contact Details API PUT endpoint with each program/category parameter populated:
   a. A successful response is returned.
   b. The changes are reflected on the Customer Contact Detail page.
   Technical Note: Each opt-in parameter should be tested individually, and in full combination (5 requests total).
6. Create regression scripts to verify that when valid requests are sent to the Appointment API POST (create) endpoint with each of the following "programList" details, a successful (code 201) response is returned:
   a. One supported program value
   b. A subset of supported program values
   c. All seven supported program values
   Technical Note: Each script must support both applicable versions of the Appointment API (v2, v3).
7. Create regression scripts to verify that when invalid requests due to the following deficiencies in the "programList" parameter value are sent to the Appointment API POST (create) endpoint, a bad request (code 400) response is returned with error details indicating the deficiency:
   a. No value
   b. Duplicate values
   c. Unsupported value
   Technical Note: Each script must support both applicable versions of the Appointment API (v2, v3).
8. Update the existing regression scripts which send requests to the Appointment API POST (create) endpoint to include a valid "programList" parameter value.
   Technical Note: Only the script logic for the applicable versions of the Appointment API (v2, v3) shall be updated. Script logic targeting a prior version (v1) should remain as-is.
   Expected Impact: 25 to 40 regression scripts

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	Security Matrix	CA-26062 Security Matrix.xls
2	Reports	Text Notification Report Mockup	Text Notification Report Mockup.xlsx
3	Interface	Customer Contact Details YAML file	CustomerContactPreferences.yaml
4	Interface	Customer Contact Details HTML file	CustomerContactPreferences.html
5	Correspondence	GEN 102 in English	GEN_102_EN.pdf
6	Interface	Appointment API HTML file	appointmentsv3.html

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.20	CalSAWS shall support multiple means of communicating appointments, appointment reminders, and critical dates and/or information that may affect a participant's eligibility, using the following means: a. E-mail; b. Text messaging; d. Automated phone reminder; e. USPS mail	This SCR will update the process by which a participant opts-in to receive text messages.
2.24.2.4	CalSAWS shall produce several types of reports which support all levels of staff in managing their particular workloads, including management reports, State level reports, and ad hoc reports	The Text Notification Report will be updated to provide program details associated to the text message notification.

CalSAWS

California Statewide Automated Welfare System

CA-277257
CCPU Deductions page

Table of Contents

[CA-277257 – CCPU Deductions page]

1 OVERVIEW

1.1 Current Design

Currently in CalSAWS users can deduct the amount for union dues and/or contributions from the amount to be reimbursed to the child care Provider monthly. However, users are not able to determine the overall amount that has been deducted monthly through CalSAWS easily and county users are manually tracking the amount outside of CalSAWS.

1.2 Requests

Create a new page in CalSAWS that allows county user to easily determine the overall amount of union dues and contributions that has been deducted monthly for a child care provider.

1.3 Overview of Recommendations

1. Create a new CCPU Deductions Search page to allow users to search for Child Care Provider where CCPU deductions occurred.
2. Create a new CCPU Deductions Search Detail Results page to allow user to view detail information for CCPU deductions.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. CA-260576 will be the SCR that will be automating the deduction from the child care payment.

2 RECOMMENDATIONS

2.1 CCPU Deductions Search

2.1.1 Overview

This SCR will be creating a new page to allow users to search for a CCPU provider that will provide a list of itemized CCPU deduction for a specific Service Month.

2.1.2 CCPU Deductions Search Mockup

CCPU Deductions Search

✱- Indicates required fields

[Search]

Search By Provider: ✱
[Select]

Dues Month: ✱
[_____] [📅]

Results per Page: [25 ⌄] [Search]

Figure 2.1.1.a – CCPU Deductions Search

CCPU Deductions Search

✱- Indicates required fields

[Search]

Search By Provider: ✱
Mickey Mouse [Select]

Dues Month: ✱
[09/2024] [📅]

Results per Page: [25 ⌄] [Search]

This Type 1 page took 0.65 seconds to load.

Figure 2.1.1.b – CCPU Deductions Search

CCPU Deductions Search

✱- Indicates required fields

▶ Refine Your Search

Search Results Summary					Results 1 - 25 of 28

1 2 Next

Total Amount of Union Dues Deducted for the Month: $88.05 [View Detailed Results]

Certificate ID	Case Number	Provider	Payment Request ID	Payment Request Approval Date	Amount of Union Dues Deducted
2809992119	6583269	Mickey Mouse	2809992119	09/25/2024	$2.93
4000906754	3258746	Mickey Mouse	2809720382	09/25/2024	$4.27
2809846734	6985123	Mickey Mouse	2809846734	09/25/2024	$2.70
2810034594	5321548	Mickey Mouse	4000906754	09/25/2024	$3.15
2810038446	65892305	Mickey Mouse	2810034594	09/24/2024	$2.33
2810072549	6589423	Mickey Mouse	2810038446	09/24/2024	$3.75
4000906754	3258746	Mickey Mouse	2810038584	09/24/2024	$4.85
4000906955	1234567	Mickey Mouse	2810059777	09/24/2024	$6.49
4000906455	1256567	Mickey Mouse	2810072549	09/23/2024	$6.52
400906955	12345	Mickey Mouse	2810074373	09/23/2024	$2.58
4000906900	6534567	Mickey Mouse	2810095520	09/23/2024	$6.21
4000996955	1134567	Mickey Mouse	2807633872	09/22/2024	$2.39
4000908955	1334567	Mickey Mouse	2809403813	09/22/2024	$1.99
4000906957	1234577	Mickey Mouse	2809609076	09/22/2024	$6.01
4000906951	1234562	Mickey Mouse	4001072103	09/22/2024	$2.39
4000966754	3258758	Mickey Mouse	4001117775	09/22/2024	$1.27
2809845534	6985100	Mickey Mouse	4001290479	09/22/2024	$2.54
2810065594	5681548	Mickey Mouse	4000906955	09/21/2024	$3.15
2818838446	65825305	Mickey Mouse	4001117795	09/21/2024	$1.33
2810062549	6509423	Mickey Mouse	4000641177	09/21/2024	$3.75
4000996754	3257746	Mickey Mouse	4000770067	09/20/2024	$2.85
4000905555	1236567	Mickey Mouse	4000720636	09/20/2024	$1.39
4000904455	1256555	Mickey Mouse	4000712450	09/20/2024	$3.52
400936955	1234500	Mickey Mouse	4000712501	09/20/2024	$1.58
4000901100	6534666	Mickey Mouse	4000640627	09/20/2024	$1.21

Total Amount of Union Dues Deducted for the Month: $88.05 [View Detailed Results]

1 2 Next

Figure 2.1.2.a – CCPU Deductions Search with Search Results Summary (page 1)

CCPU Deductions Search

*- Indicates required fields

▼ Refine Your Search

[Search]

Search By Provider: *	Dues Month: *
[Mickey Mouse](#) [Select]	09/2024 📅

Results per Page: 25 ▾ [Search]

Search Results Summary					Results 26 - 28 of 28

Previous 1 2

Total Amount of Union Dues Deducted for the Month: $88.05 [View Detailed Results]

Certificate ID	Case Number	Provider	Payment Request ID	Payment Request Approval Date	Amount of Union Dues Deducted
2809999919	6583258	Mickey Mouse	4000834085	09/19/2024	$2.93
4000906774	3258776	Mickey Mouse	4000578422	09/19/2024	$1.27
2809844734	6985123	Mickey Mouse	4002029187	09/18/2024	$2.70

Total Amount of Union Dues Deducted for the Month: $88.05 [View Detailed Results]

Previous 1 2

Figure 2.1.2.b – CCPU Deductions Search with Search Results Summary (page 2)
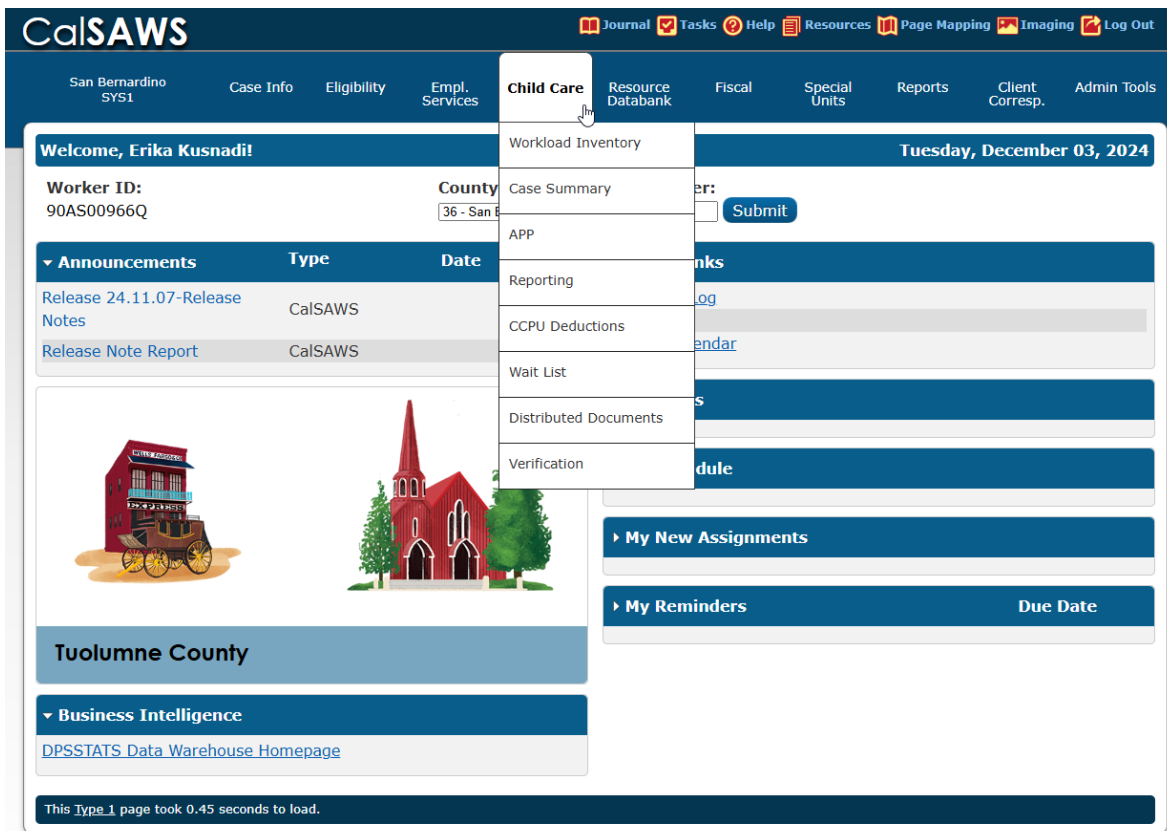
Figure 2.1.3 – CCPU Deductions Local Navigator

2.1.3 Description of Changes

1. Create a new 'CCPU Deductions' Local Navigator that will be found under the 'Child Care' Global navigation bar.
    a. The option for the 'CCPU Deductions' Local Navigator will be located between 'Reporting' and 'Wait List'.
    b. The 'CCPU Deductions' Local Navigator will be protected by a new Security Right 'CCPUDeductions'.
        i. Users who are not assigned with the 'CCPUDeductions' security right will not see the option of 'CCPU Deductions' on the Local Navigator.
2. Create a new search page title 'CCPU Deductions Search' that is accessible through the newly created 'CCPU Deductions' Local Navigator.
    a. Refine Your Search section
        i. Refine Your Search section will be collapsed when there is result being returned.
        ii. Search By Provider
            1. The provider that's selected for the search parameter will be used to determine the Payment Request that was associated to that selected Provider (this would be the Payee information on the Payment Request Detail record)
            2. This will be a required field and will have a 'Select' button.

a. Clicking on the 'Select' button will take the user to the existing 'Select Service and Provider' page.

    i. User will be re-directed back to 'CCPU Deductions Search' page after clicking on the 'Cancel' button or the 'Select' button from the 'Select Service and Provider' page.

        1. Display the selected provider name on the 'Search by Provider' field as a hyperlink along with the 'Select' (this is the Select button that will re-direct user to the 'Select Service and Provider' page) button when user clicks on the 'Select' button from the 'Select Service and Provider' page.

            a. Clicking the Hyperlink will take the user to the Resource Detail page in view mode for that specific Provider.

                i. Clicking the Close button on the Resource Detail page will take the user back to the 'CCPU Deductions Search page'.

                ii. Information on the 'CCPU Deductions Search' page will remain after being re-directed back to the page from the Resource Detail page.

Note: User will only be re-directed back to the 'CCPU Deductions Search' page from the 'Resource Detail' page, when the 'Resource Detail' page is accessed by clicking on the Provider Name Hyperlink.

        2. Display the 'Select' (this is the Select button that will re-direct user to the 'Select Service and Provider' page) button when user clicks on the 'Cancel' button from the 'Select Service and Provider' page.

Note: User will only be re-directed back to the 'CCPU Deductions Search' page from the 'Select Service and Provider' (by clicking the

Select or Cancel button) page, when the 'Select Service and Provider' page is accessed by clicking on the 'Select' button found on the 'CCPU Deductions Search' page.

      iii. Dues Month
         1. This will be a required field.
           a. Value will be in MM/YYYY format.
         2. Display the Date Picker icon.
           a. Date Picker will only have Month and Year.
         3. The Month and Year that is inputted for the search parameter will be used to determine Payment Request that was approved on the inputted Month and Year.

b. Results per Page:
    i. This dropdown limits how many records pulled per results page.
    ii. The options are:
        1. 25 (default)
        2. 50
        3. 75
        4. 100

c. Search button
    i. Clicking this button loads the search results where Payment Request was approved in the month and year inputted on the Dues by Month field for the Child Care Provider selected on the Search By Provider field and Payment Request record is associated to a Child Care Payment Request record where Union Dues was deducted.

d. Search Result Summary section
    i. Display 'No Data Found' when there is nothing found based on the inputted search parameter.
    ii. 'Total Amount of Union Dues Deducted for the Month: $XXX'
        1. XXX would reflect the total amount of all the Union Dues deducted added altogether for the Month and Year that was inputted on the Dues Month field for the provider that was selected on the Search By Provider field.
        2. The field will display the same information for all pages, when there are multiple pages on the Search Result Summary.
    iii. View Detailed Results button
        1. Clicking this button will direct user to the 'CCPU Deductions Search Detailed Results' page (refer to Section 2.2 for more detailed).
        2. This button will only display when there is something being returned on the Search Result Summary Section
    iv. Certificate ID

> 1. Display the Certificate ID that is associated to the Child Care Payment Calculation Detail record where union due deduction is applied.
>> v. Case Number
>>> 1. Display the Case Number that is associated to the corresponding Certificate ID.
>> vi. Provider
>>> 1. Display the Provider name that was selected on the Search parameter.
>> vii. Payment Request ID
>>> 1. Display the Payment Request ID for the Payment Request Detail record where it was Approved on the Month and Year that was inputted on the search parameter and for the provider that was selected on the search parameter, and it was associated to a Child Care Payment Request record where Union Dues was deducted.
>> viii. Payment Request Approval Date
>>> 1. Display the Date in MM/DD/YYYY format on when the Payment Request Detail record was approved.
>> ix. Amount of Union Dues Deducted
>>> 1. Display the amount of Union Dues deducted from the associated Child Care Payment Request record that's associated to the Payment Request record that was approved on the Month and Year that was inputted on the search parameter and for the provider that was selected on search parameter.
>>> 2. $0.00 or Null value will not be display on the Search Result Summary
>> x. Results will be ordered in Descending order (the most recent) of when the Payment Request was approved.
>> xi. Results per Page is set to 25 as a default, but update based on the option selected under the Results per page field.
> 3. Retain the Search parameter that was inputted along with the Search Result Summary information when user is re-directed back to the CCPU Deductions Search page after clicking the 'Close' button from the CCPU Deductions Search Detailed Results page.

2.1.4 Page Location

- **Global: Child Care**
- **Local: CCPU Deductions**
- **Task: CCPU Deductions Search**

2.1.5 Security Updates

1. Security Rights

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
CCPUDeductions	Access to the CCPU Deductions Search page	CCPU Deductions

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
CCPU Deductions	Access to the CCPU Deductions Search page	Child Care Staff, Child Care Supervisor, Fiscal Staff, Fiscal Supervisor

2.1.6 Page Mapping

Create page mapping for the newly created page

2.1.7 Accessibility

N/A

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 CCPU Deductions Search Detailed Results

2.2.1 Overview

This SCR will be creating a new page to allow users to view a more detailed list of itemized CCPU deduction for a specific Service Month for the Selected Child Care Provider.

2.2.2 CCPU Deductions Search Detailed Mockup

CCPU Deductions Search Detailed Results

<div align="right">Close</div>

1 2 Next

Total Amount of Union Dues Deducted for the Month: $88.05
Total Amount of Contributions Deducted for the Month: $20.00

Certificate ID	Case Number	Provider	Payment Request ID	Payment Request Approval Date	Amount of Union Dues Deducted	Amount of Contributions Deducted	Created By
2809992119	6583269	Mickey Mouse	2809992119	09/25/2024	$2.93		123456
4000906754	3258746	Mickey Mouse	2809720382	09/25/2024	$4.27	$1.00	123456
2809846734	6985123	Mickey Mouse	2809846734	09/25/2024	$2.70		654321
2810034594	5321548	Mickey Mouse	4000906754	09/25/2024	$3.15		123456
2810038446	65892305	Mickey Mouse	2810034594	09/24/2024	$2.33		123456
2810072549	6589423	Mickey Mouse	2810038446	09/24/2024	$3.75		125456
4000906754	3258746	Mickey Mouse	2810038584	09/24/2024	$4.85	$5.00	123456
4000906955	1234567	Mickey Mouse	2810059777	09/24/2024	$6.49		123456
4000906455	1256567	Mickey Mouse	2810072549	09/23/2024	$6.52		124456
400906955	12345	Mickey Mouse	2810074373	09/23/2024	$2.58		123456
4000906900	6534567	Mickey Mouse	2810095520	09/23/2024	$6.21		123456
4000996955	1134567	Mickey Mouse	2807633872	09/22/2024	$2.39	$6.00	123456
4000908955	1334567	Mickey Mouse	2809403813	09/22/2024	$1.99		133456
4000906957	1234577	Mickey Mouse	2809609076	09/22/2024	$6.01		128456
4000906951	1234562	Mickey Mouse	4001072103	09/22/2024	$2.39		123456
4000966754	3258758	Mickey Mouse	4001117775	09/22/2024	$1.27	$5.00	153456
2809845534	6985100	Mickey Mouse	4001290479	09/22/2024	$2.54		123466
2810065594	5681548	Mickey Mouse	4000906955	09/21/2024	$3.15		122456
2818838446	65825305	Mickey Mouse	4001117795	09/21/2024	$1.33		188456
2810062549	6509423	Mickey Mouse	4000641177	09/21/2024	$3.75		123556
4000996754	3257746	Mickey Mouse	4000770067	09/20/2024	$2.85		135456
4000905555	1236567	Mickey Mouse	4000720636	09/20/2024	$1.39		125856
4000904455	1256555	Mickey Mouse	4000712450	09/20/2024	$3.52		122456
400936955	1234500	Mickey Mouse	4000712501	09/20/2024	$1.58		123486
4000901100	6534666	Mickey Mouse	4000640627	09/20/2024	$1.21		123456

Total Amount of Union Dues Deducted for the Month: $88.05
Total Amount of Contributions Deducted for the Month: $20.00

1 2 Next

<div align="right">Close</div>

Figure 2.2.1.a. – CCPU Deductions Search Detailed Results (1st page)

CCPU Deductions Search Detailed Results

Search Results Summary							**Results 26 - 28 of 28**

Previous 1 2

Total Amount of Union Dues Deducted for the Month: $88.05
Total Amount of Contributions Deducted for the Month: $20.00

Certificate ID	Case Number	Provider	Payment Request ID	Payment Request Approval Date	Amount of Union Dues Deducted	Amount of Contributions Deducted	Created By
2809999919	6583258	Mickey Mouse	4000834085	09/19/2024	$2.93		123456
4000906774	3258776	Mickey Mouse	4000578422	09/19/2024	$1.27	$3.00	123456
2809844734	6985123	Mickey Mouse	4002029187	09/18/2024	$2.70		123456

Total Amount of Union Dues Deducted for the Month: $88.05
Total Amount of Contributions Deducted for the Month: $20.00

Previous 1 2

Close

This Type 1 page took 4.90 seconds to load.

Figure 2.2.1.b. – CCPU Deductions Search Detailed Results (2nd page)

2.2.3 Description of Changes

1. Create a new page title 'CCPU Deductions Search Detailed Results' that is accessible by clicking on the 'View Detailed Results' button found on the Search Results Summary Section on the 'CCPU Deductions Search' page and will display the following information:
   a. Search Result Summary section
      i. 'Total Amount of Union Dues Deducted for the Month: $XXX'
         1. XXX would reflect the total amount of all the Union Dues deducted added altogether for the Month and Year that was inputted on the Dues Month field for the provider that was selected on the Search By Provider field.
         2. The field will display the same information for all pages, when there are multiple pages on the Search Result Summary.
      ii. 'Total Amount of Contributions Deducted for the Month: $XXX'
         1. XXX would reflect the total amount of all the Contributions deducted added altogether for the Month and Year that was inputted on the Dues Month field for the provider that was selected on the Search By Provider field.
         2. The field will display the same information for all pages, when there are multiple pages on the Search Result Summary.
      iii. Certificate ID

1. Display the Certificate ID that is associated to the Child Care Payment Calculation Detail record where union due deduction is applied.
   iv. Case Number
      1. Display the Case Number that is associated to the corresponding Certificate ID.
    v. Provider
      1. Display the Provider name that was selected on the Search parameter.
   vi. Payment Request ID
      1. Display the Payment Request ID for the Payment Request Detail record where it was Approved on the Month and Year that was inputted on the search parameter and for the provider that was selected on the search parameter, and it was associated to a Child Care Payment Request record where Union Dues was deducted.
  vii. Payment Request Approval Date
      1. Display the Date in MM/DD/YYYY format on when the Payment Request Detail record was approved.
 viii. Amount of Union Dues Deducted
      1. Display the amount of Union Dues deducted from the associated Child Care Payment Request record that's associated to the Payment Request record that was approved on the Month and Year that was inputted on the search parameter and for the provider that was selected on search parameter.
      2. $0.00 or Null value will not be display on the Search Result Summary
   ix. Amount of Contributions Deducted
      1. Display the amount of Contributions deducted from the associated Child Care Payment Request record that's associated to the Payment Request record that was approved on the Month and Year that was inputted on the search parameter and for the provider that was selected on search parameter.
      2. Null value will display as $0.00
    x. Created By
      1. Display the Staff ID information of the staff that created the Payment Request Record.
   xi. Results will be ordered in Descending order (the most recent) of when the Payment Request was approved.
  xii. Results per Page is set to 25 as a default, but update based on the option selected under the Results per page field.
2. Retain the Search parameter that was inputted along with the Search Result Summary information when user is re-directed back to the CCPU Deductions Search page after clicking the 'Close' button from the CCPU Deductions Search Detailed Results page.

2.2.4 Page Location

- **Global: Child Care**
- **Local: CCPU Deductions**
- **Task: CCPU Deductions Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Create page mapping for the newly created page

2.2.7 Accessibility

N/A

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify navigation to and from the CCPU Deductions Search and CCPU Deductions Search Results pages, and the page mapping entries for each page.

2.3.2 Description of Changes

1. Create regression scripts to verify the following page navigations:
    a. To the CCPU Deductions Search page via the global / local nav and task nav.
    b. From the CCPU Deductions Search page to the CCPU Deductions Search Details Results page via the View Detailed Results button, and back via the Close button.
    c. From the CCPU Deductions Search page to the Select Service and Provider page via the Select button, and back to the CCPU Deductions Search page via the Select and Cancel buttons.
    d. From the CCPU Deductions Search page to the Resource Detail page via the Search by Provider hyperlink, and back to the CCPU Deductions Search page via the Cancel button.
2. Create regression scripts to verify that a page mapping entry exists for each applicable field on each of the following pages:
    a. CCPU Deductions Search
    b. CCPU Deductions Search Detailed Results

CA-277322

Update Threshold languages for MC Fragments to Remove Property References

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sumanth Vydana
	Reviewed By	Tiffany Huckaby

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
11/22/2024	1.0	Initial Draft	Sumanth vydana

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CA-277322 – Update Threshold languages for MC Fragments to Remove Property References

1 OVERVIEW

This effort is to remove the property related verbiage in the remaining all threshold languages of the Med-Cal fragments. (SCR CA-269983 updated English and Spanish)

1.1 Current Design

SCR CA-269983 updated the English and Spanish property related verbiage for the following fragments. The property related verbiage is currently on the other threshold languages for the following fragments.

MC_AP_FORMER_FOSTER_YOUTH_M147
MC_CH_FORMER_FOSTER_YOUTH_M147

1.2 Requests

Update the below MC Fragments to remove Property references in threshold languages.
MC_AP_FORMER_FOSTER_YOUTH_M147
MC_CH_FORMER_FOSTER_YOUTH_M147

Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, Vietnamese

1.3 Overview of Recommendations

1. Update MC Fragments to remove Property references in threshold languages

   MC_AP_FORMER_FOSTER_YOUTH_M147
   Languages Include: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Russian, Tagalog, Vietnamese, Lao

   MC_CH_FORMER_FOSTER_YOUTH_M147
   Languages Include: Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Russian, Tagalog, Vietnamese, Lao

1.4 Assumptions

1. There are no changes to the generation logic of Med-Cal fragments.
2. The reason fragments verbiage update will only be updated in Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Russian, Tagalog, Vietnamese, Lao languages with this effort. English and Spanish verbiage were updated in SCR CA-269983.

2 RECOMMENDATIONS

2.1 Update MC Reason Fragments Verbiage related to Property

2.1.1 Overview

This effort is to update the Med-Cal fragments to remove all the property related verbiage for threshold languages.

The following Fragments currently contain Property related text. The fragments will be updated to no longer include Property related text. Note: adding English verbiage as reference.

2.1.2 Description of Changes

List of Impacted Fragments:

Fragment Name	Current Text	Updated Text
MC_AP_FORMER_FOSTER_YOUTH_M147 To be updated in Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Russian, Tagalog, Vietnamese, Lao	The Medi-Cal program for Former Foster Youth gives free Medi-Cal until age 26 to young adults like you who were in foster care at age 18 or older. Income **and property** does not matter for this program. Your Medi-Cal will continue without any break, and you will remain eligible for this Medi-Cal program until your 26th birthday, as long as you live in California	The Medi-Cal program for Former Foster Youth gives free Medi-Cal until age 26 to young adults like you who were in foster care at age 18 or older. Income does not matter for this program. Your Medi-Cal will continue without any break, and you will remain eligible for this Medi-Cal program until your 26th birthday, as long as you live in California

MC_CH_FORMER_FOSTER_YOUTH_M147 To be updated in Arabic, Armenian, Cambodian, Chinese, Hmong, Korean, Russian, Tagalog, Vietnamese, Lao	As of <DATE>, you have been moved into the Medi-Cal program for Former Foster Youth. The Medi-Cal program for Former Foster Youth gives free Medi-Cal until age 26 to young adults like you who were in foster care at age 18 or older. Income **and property** does not matter for this program until your 26th birthday, as long as you live in California.	As of <DATE>, you have been moved into the Medi-Cal program for Former Foster Youth. The Medi-Cal program for Former Foster Youth gives free Medi-Cal until age 26 to young adults like you who were in foster care at age 18 or older. Income does not matter for this program until your 26th birthday, as long as you live in California.

2.2 Turn On Threshold languages for below fragments

2.2.1   Description of Change

The fragments listed below should turn on CT662 Entries for threshold languages, such as Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Russin, Tagalog, Vietnamese, Lao

2.3 List of Fragments Change

Update the Following Med-Cal fragments to remove all the property related verbiage for threshold languages of Arabic, Armenian, Cambodian, Chinese, Hmong, Farsi, Korean, Russian, Tagalog, Vietnamese, Lao languages

ID	Fragment Name
6326	MC_AP_FORMER_FOSTER_YOUTH_M147
6327	MC_CH_FORMER_FOSTER_YOUTH_M147

Mockups/Examples: See Supporting Document #1

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	FRAGMENTS	MC_AP_FORMER_FOSTER_YOUTH_M147	MC_AP_FORMER_FOSTER_YOUTH_M147_AE.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_CA.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_AR.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_CH.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_FA.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_HM.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_KO.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_RU.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_TG.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_VI.PDF MC_AP_FORMER_FOSTER_YOUTH_M147_LA.PDF
2			MC_CH_FORMER_FOSTER_YOUTH_M147_AE.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_CA.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_AR.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_CH.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_FA.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_HM.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_KO.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_RU.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_TG.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_VI.PDF MC_CH_FORMER_FOSTER_YOUTH_M147_LA.PDF

4 PROJECT REQUIREMENTS

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.1.5 CAR-1209	The CalSAWS shall collect and store the code, text, and the federal, State, and/or COUNTY manual section reference number for each reason and/or any possible combination of reasons for a proposed action and shall print the reason and the manual section reference number on each appropriate NOA.	Update the MC fragments to no longer reference Property changes

CalSAWS

California Statewide Automated Welfare System

CA-277658

Updated Policy Regarding Non-Modified Adjusted Gross Income Eligibility Determination Procedures

DOCUMENT APPROVAL HISTORY			
Prepared By	Nithin Halesh		
Reviewed By			
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
11/16/2024	1.0	Initial Draft	Nithin Halesh

CalSAWS logo

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CA-277658 Updated Policy Regarding Non-Modified Adjusted Gross Income Eligibility Determination Procedures

1 OVERVIEW

The purpose of this SCR is to disable the automatic generation of the "Non-MAGI Screening Packet" and "Non-MAGI Turning 65 Packet" as well as remove these packets from the template repository.

1.1 Current Design

DHCS instructed counties to mail the Non-MAGI Screening Packet supplemental forms to applicants or members potentially eligible to Non-MAGI Medi-Cal programs if the necessary information was not available through ex-parte review to complete the Non-MAGI determination. The Non-MAGI Screening Packet included a cover letter, the Income and Property Supplement form (MC 604IPS) to collect asset, income, expenses, and household information required to complete the Non-MAGI eligibility determination and a Non-MAGI informational brochure (Pub 10).

The Non-MAGI and Turning 65 packets generate when an individual loses MAGI eligibility and has a soft pause status. Note: The cases will continue to be placed in Soft Pause, however, the Non-MAGI packet will no longer be sent by batch.

1.2 Requests

1. Turn off the Non-MAGI Screening Packet batch job (PB00R538).
2. Turn off the Non-MAGI Turning 65 Packet batch job (PB00R1981).
3. Obsolete "Non-MAGI Screening Packet" and "Non-MAGI Turning 65 Packet" from the template repository.

1.3 Overview of Recommendations

1. Turn off the Non-MAGI Screening Packet batch job (PB00R538).
2. Turn off the Non-MAGI Turning 65 Packet batch job (PB00R1981).
3. Obsolete "Non-MAGI Screening Packet" and "Non-MAGI Turning 65 Packet" from the template repository.

1.4 Assumptions

1. Counties can setup a Soft Pause Automated Action "Medi-Cal Recipient: Soft Pause DER Received" to identify when a person has soft paused.

2 RECOMMENDATIONS

2.1 Turn off Non-MAGI Screening Packet

2.1.1 Overview

This effort will disable the automatic generation of the Non-MAGI Screening Packet via Batch Job PB00R538 and will also remove the packet from the template repository.

Form Number: Non-MAGI Scrn Pkt
Existing Languages: Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Russian, Spanish, Tagalog, Vietnamese

2.1.2 Description of Change

Disable the automatic generation of the Non-MAGI Screening Packet through batch job PB00R538 and turn off the form generation via the template repository.

2.2 Turn off Non-MAGI Turning 65 Packet

2.2.1 Overview

This effort will disable the automatic generation of the Non-MAGI Turning 65 Packet via Batch Job PB00R1981 and will also remove the packet from the template repository.

Form Number: Non-MAGI Turning 65
Existing Languages: Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Russian, Spanish, Tagalog, Vietnamese

2.2.2 Description of Change

Disable the automatic generation of the Non-MAGI Turning 65 Packet through batch job PB00R1981 and turn off the form generation via the template repository.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	ACWDL	ACWDL 24-11	ACWDL 24-11.pdf

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-279201

Add the NA 693 to Template Repository

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya HS
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/06/2024	1.0	Draft Design	Ramya HS

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1   OVERVIEW

The purpose of this change is to add the latest version of NA 693 (9/22) form to CalSAWS Template Repository.

1.1   Current Design

Currently CalSAWS does not have the NA 693 (9/22) in the Template Repository.

1.2   Requests

Add NA 693 (9/22) form to CalSAWS Template Repository.

Languages Include: English, Spanish, Armenian and Chinese.

1.3   Overview of Recommendations

Add NA 693 (9/22) form to CalSAWS Template Repository.

Languages Include: English, Spanish, Armenian and Chinese.

1.4   Assumptions

1. No variables will be populated on the new NA 693 aside from the standard header and footer information.
2. All fields (blank or prepopulated) will be editable.
3. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add NA 693 to CalSAWS in English and available threshold languages

2.1.1 Overview

This effort will add the NA 693 form in English and available threshold languages to CalSAWS Template Repository.

State Form: NA 693 (9/22)

Programs: CAPI

Attached Form(s): N/A

Forms Category: NOA

Current Template Repository Visibility: All Counties

Template Description: Notice of Approval -Cash Assistance for Immigrants (CAPI)

Languages: English, Spanish, Armenian and Chinese.

2.1.2 Form Verbiage

Create NA 693 XDPs

A new XDPs will be created for NA 693 (9/22) in English and threshold languages.

Languages Include: English, Spanish, Armenian and Chinese*.

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

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): Notice of Approval - Cash Assistance for Immigrants (CAPI)

Form Number: NA 693

Include NA Back 9: Yes

Imaging Form Name: Notice Of Approval - CAPI

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form Variable Population

N/A

2.1.4 Form Generation Conditions

NA 693 (9/22) form can be generated via Template repository.

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

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English form.

Print Options:

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

Mailing Options:

Mailing Options	Option NA 693
Mail-To (Recipient)	Applicant selected on the document parameters.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A

Additional Options:

Requirement	Option for NA 693 Form
Post to Self-Service Portal	Y

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	NA 693 form	NA693_English.pdf NA693_Spanish.pdf NA693_Armenian.pdf NA693_Chinese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices;	NA 693 is being added in English and available threshold Languages to CalSAWS Template Repository.

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

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-279784

Update Vietnamese version of recoupment begin
NOA reason for CF 377.4 SAR to not have duplicate
EBT and Medi-Cal messages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sujit Neupane
	Reviewed By	[individual(s) from Build and Test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/04/2024	1.0	Initial Draft	Sujit Neupane

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1 OVERVIEW

This effort is to update recoupment begin NOA reason fragment for CF 377.4 SAR to not include EBT and Medi-Cal message. Message fragment (CF_CH_MESSAGE4 (ID: 5007)) which generates with this reason fragment already includes the EBT and Medi-Cal message.

1.1 Current Design

CF 377.4 SAR NOA reason fragment for recoupment begin has EBT and Medi-Cal message.

1.2 Requests

Update Vietnamese version of recoupment begin NOA reason - CF_CH_RECOMP_BEG_F467 for CF 377.4 SAR to not have EBT and Medi-Cal messages.

1.3 Overview of Recommendations

1. Update Vietnamese version of recoupment begin NOA reason to not include EBT and Medi-Cal messages.

1.4 Assumptions

1. SCR CA-265360 will update the CF 377.4 SAR to the 9/23 version.
2. SCR CA-285482 will update the verbiage of threshold languages – Arabic, Farsi, Hmong, Lao, Spanish to match English version.

2 RECOMMENDATIONS

2.1 Update Vietnamese version of recoupment begin NOA to not include EBT and Medi-Cal messages.

2.1.1 Overview

Vietnamese version of recoupment begin NOA reason fragment includes EBT and Medi-Cal message which should be removed. Message fragment (CF_CH_MESSAGE4 (ID: 5007)) which generates with this reason fragment already includes the EBT and Medi-Cal message. Also, Vietnamese version will be turned on with this effort.

Reason Fragment Name and ID: CF_CH_RECOMP_BEG_F467, ID: 6108
State Form/NOA: CF 377.4 SAR (6/13)
Current NOA Template: TEMPLATE_CF_NOA (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: N/A

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

2.1.2 Form/NOA Verbiage

Update Fragment XDP

Update the reason fragment XDP to not include the EBT and Medi-Cal messages.

Updated Languages: Vietnamese.

NOA Mockups/Examples: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

We are not updating any variable population with this effort.

2.1.4 Form/NOA Generation Conditions

We are not updating generation conditions with this effort.

3   SUPPORTING DOCUMENTS

Note: The back of the NOA will generate with the current CalSAWS NA Back 9.

Number	Functional Area	Description	Attachment
1.	NOA	Vietnamese verbiage for CF_CH_RECOMP_BEG_F467 NOA reason	Vietnamese_verbiage.xlsx

CA-280501

ACL 24-52 WTW 2 Revision (06/24)

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Aishwarya Shankar
	Reviewed By	

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
12/05/2024	1.0	Initial Draft	Aishwarya Shankar

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CA-280501 – ACL 24-52 WTW 2 Revision (06/24)

1 OVERVIEW

This SCR updates the WTW 2 to the latest state 6/24 version.

1.1 Current Design

The WTW 2 (5/21) currently exists in CalSAWS in English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

1.2 Requests

Update the WTW 2 in English, Spanish, Arabic, Armenian, Chinese, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese to the latest state version (6/24). Add the WTW 2 (6/24) to CalSAWS in Hindi, Mien, Ukrainian, Punjabi, and Thai.

1.3 Overview of Recommendations

1. Update the WTW 2 form in English, Spanish, Arabic, Armenian, Chinese, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese to the latest state version (6/24).
2. Add the WTW 2 (6/24) to CalSAWS in Hindi, Mien, Ukrainian, Punjabi, and Thai.
3. Turn off the Cambodian and Farsi WTW 2 (5/21).

1.4 Assumptions

1. The WTW 2 form can be generated via the Template Repository and through the Activity Agreement Detail online page.
2. There are no changes to any current functionality of the form unless specified in the recommendation of this design document.
3. The Cambodian and Farsi WTW 2 are being turned off with this SCR as the latest 6/24 versions in these languages have not yet been provided by the State. SCR CA-286092 has been created to update the WTW 2 in these two languages to the 6/24 version once they are provided by the State.

2 RECOMMENDATIONS

2.1 Update the WTW 2 form to the latest state version (6/24)

2.1.1 Overview

This recommendation is to update the WTW 2 form to the latest state version (6/24).

State Form: WTW 2 (6/24)
Current Program: Welfare to Work (WTW), Refugee Employment Program (REP)
Current Attached Forms: None
Current Forms Category: Forms
Current Template Repository Visibility: All Counties
Existing Languages: English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

Current Print Options: All

Current Posted to SSP: Yes

Electronic Signatures:

Electronic Signature (IVR/Text): Yes

Check to Sign: Yes

2.1.2 Form Verbiage

Update WTW 2 English Form XDP

Updated Languages: English, Spanish, Arabic, Armenian, Chinese, Hmong, Korean, Lao, Russian, Tagalog, Vietnamese, Hindi, Mien, Ukrainian, Punjabi, and Thai.

Include NA Back 9: No
Form Mockups/Examples: See Supporting Document #1

*TECHNICAL NOTES:
- Threshold language WTW 2 forms will use the same corresponding header as the English version.

DESCRIPTION	EXISTING TEXT	UPDATED TEXT	FORMATTING
CalWORKs Welfare-to-Work Activities	Job skills training directly related to to employment	Job skills training directly related to employment	Arial Font Size 10

DESCRIPTION	EXISTING TEXT	UPDATED TEXT	FORMATTING
SUPPORTIVE SERVICES	I understand that I must tell my Welfare-to-Work worker right away if my need for Welfare-to-Work supportive services changes, or if I no longer need them. If I do not report the changes in advance, the county may not be able to pay for them. I understand that if I stop participating in my Welfare-to-Workactivities, I will continue to receive child care for the remainder of my child care authorization period or until my child care authorization is discontinued.	I understand that I must tell my Welfare-to-Work worker right away if my need for Welfare-to-Work supportive services changes, or if I no longer need them. If I do not report the changes in advance, the county may not be able to pay for them. I understand that if I stop participating in my Welfare-to-Work activities, I will continue to receive child care for the remainder of my child care authorization period or until my child care authorization is discontinued.	Arial Font Size 10
SUPPORTIVE SERVICES section I need the following supportive services:	Full-time (30-52.5 hours per week)	Full-time (25-52.5 hours per week)	Arial Font Size 10

DESCRIPTION	EXISTING TEXT	UPDATED TEXT	FORMATTING
SUPPORTIVE SERVICES section I need the following supportive services:	Part-time (less than 30 hours per week)	Part-time (less than 25 hours per week)	Arial Font Size 10
Page 4 of 4 before Participant's Signature		I declare under penalty of perjury that the above information is true and correct to the best of my knowledge. I acknowledge that by providing my electronic signature for this form, I agree my electronic signature is the legal binding equivalent to my handwritten signature. I hereby confirm that my electronic signature represents my execution of authentication of this form, and my intent to be bound by it.	Arial Font Size 10

2.1.3 Form Variable Population

There are no updates to the form variable population for the WTW 2 form.

*TECHNICAL NOTE: The field LEGAL_AID_PHONE_NUMBER will continue to be a singular text field and will follow the existing variable population logic.

2.1.4 Form Generation Conditions

Turn off threshold languages: Cambodian and Farsi

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
#1	Client Correspondence	WTW2 English Mockup	WTW2_MOCKUP_EN.PDF

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

4 REQUIREMENTS

REQ #	REQUIREMENT TEXT	HOW REQUIREMENT MET
CAR-1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	This SCR updates the WTW 2 form.

Design Document

CA-281141 Add Ignore Barcode Capture to Specialty Drawers

10/17/2024

DOCUMENT APPROVAL HISTORY	
Owner	Robyn Anderson
Preparer	Robyn Amderson
Reviewer	Chris Vasquez, Rhiannon Chin
Approver	

APPROVAL DATE	APPROVED VERSION	REVIEWED AND APPROVED BY

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TABLE OF TABLES

NO TABLE OF FIGURES ENTRIES FOUND.

TABLE OF FIGURES

CA-281141 Add Ignore Barcode Capture to Specialty Drawers

1   OVERVIEW

1.1   Current Design

Currently, users have several different capture profiles to choose from when uploading document into the Hyland Imaging Solution. Some of those capture profiles send the document to specialty drawers instead of the Case or Person drawers. The Hearings File and Hearings Scan capture profiles will send documents to the Hearings Drawer. The SIU File and SIU Scan capture profiles will send the document to the SIU Drawer. All four of these capture profiles will read the document barcodes and attempt to fill in the case and form information based on the barcode, and there is no way for the user to turn this functionality off.

Similarly, the Other County Department capture profiles leverage barcodes to split documents. This creates unintended breaks in scanned documents when users want barcoded documents to display as one.

1.2   Requests

Create the following capture profiles to give users the option to ignore the barcode at the point of scan and fill in the information themselves:

- Adoptions (AAP) Ignore Barcode File
- Adoptions (AAP) Ignore Barcode Scan
- Adult Aging (IHSS) Ignore Barcode File
- Adult Aging (IHSS) Ignore Barcode Scan
- CWS Ignore Barcode File
- CWS Ignore Barcode Scan
- Hearings Ignore Barcode File
- Hearings Ignore Barcode Scan
- SIU Ignore Barcode File
- SIU Ignore Barcode Scan
- QA/QC Ignore Barcode File
- QA/QC Ignore Barcode Scan
- RDB Ignore Barcode File
- RDB Ignore Barcode Scan

1.3   Overview of Recommendations

Create Ignore Barcode capture modes for the Specialty and Other County Department drawers.

1.4   Assumptions

1. Access to the new capture modes will be governed by the currently existing security rights.
2. Workflow routing within the Imaging Solution will not change or be updated with this design.

2 RECOMMENDATIONS

2.1   Hearing Ignore Barcodes and SIU Ignore Barcodes Capture Modes

2.1.1   Overview

Fourteen new capture modes will be added to the Imaging solution, Hearings Ignore Barcode File, Hearings Ignore Barcode Scan, SIU Ignore Barcode File, SIU Ignore Barcode Scan, Adoptions (AAP) Ignore Barcode File, Adoptions (AAP) Ignore Barcode Scan, Adult Aging (IHSS) Ignore Barcode File, Adult Aging (IHSS) Ignore Barcode Scan, CWS Ignore Barcode File, CWS Ignore Barcode Scan, QA/QC Ignore Barcode File, QA/QC Ignore, Barcode Scan, RDB Ignore Barcode File and RDB Ignore Barcode Scan. These new capture modes will prevent the system from using the barcode to fill in the case and form fields based on the barcode information. The user will manually fill in those fields without the system overriding the information.

2.1.2   Description of Change

Fourteen new capture modes will be added to the Capture Profile dropdown menu on the Capture and Indexing screen. Hearings Ignore Barcode File, Hearings Ignore Barcode Scan, SIU Ignore Barcode File, SIU Ignore Barcode Scan, Adoptions (AAP) Ignore Barcode File, Adoptions (AAP) Ignore Barcode Scan, Adult Aging (IHSS) Ignore Barcode File, Adult Aging (IHSS) Ignore Barcode Scan, CWS Ignore Barcode File, CWS Ignore Barcode Scan, QA/QC Ignore Barcode File, QA/QC Ignore, Barcode Scan, RDB Ignore Barcode File and RDB Ignore Barcode Scan will be grouped alphabetically with the existing capture modes. Special Investigations (SIU) will be shortened to SIU, Adult Aging Service (IHSS) will be shortened to Adult Aging (IHSS), Child Welfare Services (CWS) will be shortened to CWS, Quality Assurance/Control (QA/QC) will be shortened to QA/QC and Resource Data Bank (RDB) will be shortened to RDB for the Ignore Barcodes capture profiles since the capture profile names are limited to 40 characters.

Capture and Indexing ⚙

* **Capture Profile**

Adoptions (AAP) File ▼

*	Adoptions (AAP) File
	Adoptions (AAP) Ignore Barcode File
	Adoptions (AAP) Ignore Barcode Scan
*	Adoptions (AAP) Scan
	Adult Aging Services (IHSS) File
	Adult Aging Services (IHSS) Scan
	Adult Aging (IHSS) Ignore Barcode File
*	Adult Aging (IHSS) Ignore Barcode Scan
	Child Welfare Services (CWS) File
	Child Welfare Services (CWS) Scan
	CWS Ignore Barcode File
	CWS Ignore Barcode Scan
	Hearings File
	Hearings Ignore Barcode File
	Hearings Ignore Barcode Scan
	Hearings Scan
	Ignore Barcode File
	Ignore Barcode Photo Scan
	Ignore Barcode Scan
	Multi Case Photo Scan

Cancel   Start

Figure 2-1-2-1 - Capture and Indexing with New Ignore Barcode profiles

Capture and Indexing ⚙

---

* **Capture Profile**

| Adoptions (AAP) File | ▾ |

* QA/QC Ignore Barcode File
QA/QC Ignore Barcode Scan ▯
Quality Assurance/Control (QA/QC) [B&W]
* Quality Assurance/Control (QA/QC) Scan
RDB Ignore Barcode File
RDB Ignore Barcode Scan
Resource Data Bank (RDB) File
* Resource Data Bank (RDB) Scan
Return Mail File
Return Mail Scan
Single Case File
Single Case Photo Scan
Single Case Scan
SIU Ignore Barcode File
SIU Ignore Barcode Scan
Special Investigation Unit (SIU) File
Special Investigation Unit (SIU) Scan
Task Override Photo Scan
Task Override Scan
Task Override File

Cancel   **Start**

Figure 2-2-2-2 Capture and Indexing with New Ignore Barcode profiles

Once the user selects one of the new capture profiles, they will behave exactly like the current capture files, except that any barcode on the document will be ignored and the user entered information will be used. On the Capture and Indexing and QA screens, the new capture profiles will require the user to fill out the same fields as the existing capture modes.

Once the batch is submitted, the document will follow the usual Imaging Solution's Workflow routing rules, and the documents will be routed to the respective specialty drawers.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-281506

ACL 24-53 Update CF 303 to 7/24 Version

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Aishwarya Shankar
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/21/2024	1.0	Initial Draft	Aishwarya Shankar

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1 OVERVIEW

This SCR updates the CF 303 to the latest state 7/24 version.

1.1 Current Design

The CF 303 (8/19) currently exists in CalSAWS in English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

1.2 Requests

Update the CF 303 in English and existing threshold languages to the latest state version (7/24). Add the CF 303 (7/24) to CalSAWS in Hindi, Japanese, Mien, Punjabi, and Ukrainian.

1.3 Overview of Recommendations

1. Update the CF 303 form in English and existing threshold languages to the latest state version (7/24).
2. Add the CF 303 (7/24) to CalSAWS in Hindi, Japanese, Mien, Punjabi, and Ukrainian.
3. Provide fillable PDFs to BenefitsCal to be available for download on the BenefitsCal Portal.

1.4 Assumptions

1. The CF 303 form can be generated only via the Template Repository.
2. There are no changes to any current functionality of the form unless specified in the recommendation of this design document.
3. The "REPLACEMENT" and signature field (in the "DISASTER SUPPLEMENT" section) on the CF 303 form will keep with the original design, as outlined in Section 2.2.2 of the design document of SCR CA-260913. The text field in the "REPLACEMENT" section will continue to be 1 large text box that allows for long text to be entered in continuation. The signature section under the "DISASTER SUPPLEMENT" section of the form will also be kept with this SCR, so that BenefitsCal can map to the XDP for the signature.
4. Recommendation 3 in Section 1.3 does not require any design and is intended to note that CalSAWS will provide the fillable PDFs to BenefitsCal to be uploaded for the customers.

2 RECOMMENDATIONS

2.1 Update the CF 303 form to the latest state version (7/24)

2.1.1 Overview

This recommendation is to update the CF 303 form to the latest state version (7/24).

State Form: CF 303 (7/24)

Current Program: CalFresh

Current Attached Forms: NA Back 9

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

Current Print Options: All

Current Posted to SSP: Yes

Electronic Signatures:

> **Electronic Signature (IVR/Text):** Yes
>
> **Check to Sign:** No

2.1.2 Form Verbiage

Update CF 303 English Form XDP

The table below identifies the changes to be made to the CF 303 English form XDP to update it to the latest state version (7/24).

Location	Existing Language	Updated Language
"Instructions" section	Note, this form must be submitted within 10 days of your reported food-loss or your household may not be eligible to receive replacement benefits.	<u>Note:</u> This form must be submitted within 10 days of your reported food-loss or your household may not be eligible to receive replacement benefits.
"DISASTER SUPPLEMENT" section	My household resides in a federally declared disaster area with individual assistance and I have experienced one or more	My household lived or worked in a federally declared disaster area with Individual Assistance (IA) and I have experienced one

	adverse effects as a result of the disaster.	or more adverse effects as a result of the disaster.
"REPLACEMENT/DISASTER SUPPLEMENT" section	APPROVED - Benefit Replacement Date _____ Benefit Replacement Amount $ _____	APPROVED - Benefit Replacement Date _____ CalFresh Benefit Replacement Amount $ _____ CFAP Benefit Replacement Amount $ _____
Rules section	These rules may apply and you may review at your welfare office MPP 16-515 and 16-517.	These rules may apply: MPP 16-515, 16-517, 7 CFR 274.6(a)(6)(ii), 7 CFR 274.6(a)(3)(iii), and ACL 19-95. You may review them at your local office.

Updated Languages: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese, Hindi, Japanese, Mien, Punjabi, and Ukrainian.

Include NA Back 9: Yes

Form Mockups/Examples: See Supporting Document #1 and Supporting Document # 2

*NOTE: Supporting Document #1 is intended to show all the text fields present on the form, the general layout of the form, and the updated verbiage. Supporting Document # 2 is a flat file of the same form to show that the "CF 303" form footer should be removed from the NA Back 9 attached to the form. Threshold languages should follow the same, with regards to the footer.

*TECHNICAL NOTES:
- Threshold language CF 303 forms will use the same corresponding header as the English version.
- For the form footer, the text "Required Form – No Substitutes Permitted" needs to be added after the form number and version as shown in the mockup
  ie. CF 303 (7/24) Required Form – No Substitutes Permitted

2.1.3 Form Variable Population

There are no updates to the form variable population for the CF 303 form.

2.1.4 Form Generation Conditions

There are no updates to the form generation conditions for the CF 303 form.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Forms	CF 303 English Mockup	CF303_Mockup_EN.pdf
2.	Forms	CF 303 English PDF Flat File	CF303_Mockup_EN_FlatFile.pdf

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

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1242	The LRS shall produce notices, NOAs, forms, letters, stuffers, and flyers, either generated by the LRS or initiated by COUNTY-specified Users, that may be sent to an applicant, participant, caregiver, sponsor, authorized representative, Vendor, landlord, and/or any other public or private individual or agency.	This SCR updates the CF 303 form.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-281785

Update the NA 1232 to the latest State version

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Ramya HS
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
01/02/2025	1.0	Draft Design	Ramya HS

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1 OVERVIEW

The purpose of this change is to update the NA 1232 (2/21) form to match latest state version.

1.1 Current Design

Currently NA 1232 (2/21) version is available in CalSAWS Template Repository.

1.2 Requests

Update the NA 1232 in CalSAWS Template Repository to match the latest State version (9/23) in English and threshold languages.

Languages Include: English, Spanish, Armenian and Chinese.

1.3 Overview of Recommendations

Update the NA 1232 in CalSAWS Template Repository to match the latest State version (9/23) in English and threshold languages.

Languages Include: English, Spanish, Armenian and Chinese.

1.4 Assumptions

1. There is no variable population with this effort. (aside from the standard header and footer information).
2. All fields (blank or prepopulated) will be editable.
3. Supporting Documents section references attachments found on Jira.

2   RECOMMENDATIONS

2.1   Update the NA 1232 to Current version (9/23) in English and threshold languages

2.1.1   Overview

This effort will update the NA 1232 form to match latest state version (9/23) in CalSAWS Template Repository.

State Form: NA 1232 (9/23)

Programs: CAPI

Attached Form(s): N/A

Forms Category: NOA

Current Template Repository Visibility: All Counties

Template Description: CAPI Notice of Overpayment - Waiver Denial

Languages: English, Spanish, Armenian and Chinese.

2.1.2   Form Verbiage

<u>Update NA 1232 XDPs</u>

Existing NA1232 XDPs will be updated to latest state version (9/23) in English and threshold languages.

Threshold Languages: Spanish, Armenian and Chinese*.

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

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Form Title (Document List Page Displayed Name): CAPI Notice of Overpayment - Waiver Denial

Form Number: NA 1232

Include NA Back 9: Yes

Imaging Form Name: CAPI Notice of OP – Waiver Denial

Imaging Document Type: CAPI

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

2.1.3   Form Variable Population

N/A

2.1.4 Form Generation Conditions

NA 1232 (9/23) form can be generated via Template repository.

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

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Form Print/Mailing Options

Threshold forms will have the same Form Print/Mailing Options as their corresponding English form.

Print Options:

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

Mailing Options:

Mailing Options	Option NA 1232
Mail-To (Recipient)	Applicant selected on the document parameters.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Additional Options:

Requirement	Option for NA 1232 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	NA 1232 form	NA1232_EN.pdf NA1232_SP.pdf NA1232_AE.pdf NA1232_CH.pdf

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS);	NA 1232 is being updated to latest state version in CalSAWS Template Repository.

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

CalSAWS

California Statewide Automated Welfare System

CA-282363

Remove MSSP as Program Option from Online Pages

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Shwetha Nagaraja Rao	
	Reviewed By	Tisha Mutreja	
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
11/27/2024	.01	Initial Draft	Shwetha Nagaraja Rao
11/27/2024	.02	Updated as per review comments	Shwetha Nagaraja Rao

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CA-282363 – Remove MSSP as Program Option from Online Pages

1 OVERVIEW

The purpose of this SCR is to remove "Multipurpose Senior Services Program (MSSP)" as Program Option on the various online pages in the CalSAWS application.

1.1 Current Design

MSSP is a waiver under the Medi-Cal program, it is not a standalone program. CA-265116 removed MSSP as a program option from the Select Program, New Program and Other Program Assistance online pages effective 12/01/2023. However, the System still has 'Multipurpose Senior Services Program' as a Program option in 34 other online pages throughout the System.

1.2 Requests

Remove "Multipurpose Senior Services Program" from Program Type drop down selection on all the online pages that currently display "Multipurpose Senior Services Program" as a Program effective 12/01/2023.

1.3 Overview of Recommendations

The list of identified online pages that display "Multipurpose Senior Services Program" is below

- Task Search:

- Create QA/QC Batch

- Distributed Documents Search

- Workload Reassignment detail

Continued below is list of pages that also display "Multipurpose Senior Services Program" as a Program Search Option

- Service Arrangements List
- Administrative Disqualification Search
- Asset Verification Search
- Best Practice Search
- Best Practice Detail
- Performance Analysis Search
- Performance Analysis Detail
- Standard Detail
- Recovery Account Workload Inventory
- Fiscal History Search
- Invoice Search
- Issuance Search
- Issuance Search Detail
- Automated Action List
- Template Repository Search
- Distributed Documents Search
- Hearing Detail
- Valuable Request Search
- Emergency Text Detail
- Care and Maintenance Fund Detail
- Valuable Request Search
- Document Parameters
- Report Search
- Flag Search
- Recovery Account Search
- Receipt Mass Upload Search
- QA/QC Task Sample Detail

- Quality Review Detail
- Receipt Mass Upload
- Finding Detail

1.4 Assumptions

1. Fields not mentioned to be modified within the online pages 'Description of Changes' will retain their current functionality.
2. Changes mentioned in the SCR are only Online Page changes, this cosmetic change does not impact Medi-Cal EDBC Rules.

2 RECOMMENDATIONS

2.1 Online Pages

2.1.1 Overview

Remove 'MSSP' as search option from below list of online pages from Program List dropdown.

- Task Search
- Create QA/QC Batch
- Distributed Documents Search
- Workload Reassignment detail
- Service Arrangements List
- Administrative Disqualification Search
- Asset Verification Search
- Best Practice Search
- Best Practice Detail
- Performance Analysis Search
- Performance Analysis Detail
- Standard Detail
- Recovery Account Workload Inventory
- Fiscal History Search
- Invoice Search
- Issuance Search
- Issuance Search Detail
- Automated Action List
- Template Repository Search
- Distributed Documents Search
- Hearing Detail
- Valuable Request Search
- Emergency Text Detail
- Care and Maintenance Fund Detail
- Valuable Request Search
- Document Parameters
- Report Search
- Flag Search
- Recovery Account Search

- Receipt Mass Upload Search
- QA/QC Task Sample Detail
- Quality Review Detail
- Receipt Mass Upload
- Finding Detail

2.1.2 Mockup of Online Pages

Figure 2.1.1 – 'Task Search' Page

Figure 2.1.2 – 'Create QA/QC Batch' Page

Figure 2.1.3 – 'Workload Reassignment Detail' Page

Figure 2.1.4 – 'Distributed Documents Search' Page

2.1.3 Description of Changes

Effective 12/2023, for all counties, do not display Program Type "Multipurpose Senior Services" in the drop down for all the online pages provided in the list of section 2.1.1

NOTE: MSSP to be removed as option from the drop down list for all online pages mentioned in section 2.1.1. as shown in the Mockup examples

2.1.4 Page Location

Reference to be obtained from "Help" function from the utility tab of the Home page to navigate to each page mentioned in section 2.1.1

2.1.5 Security Updates

No Changes

2.1.6 Page Mapping

No Changes

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

No Changes

California Statewide Automated Welfare System

Design

CA-282436

Add Two New OPOI Informational Notices for IPV to the Template Repository

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Ramon Villarreal-Leal	
	Reviewed By		
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
11/13/2024	1.0	Initial Draft	Ramon Villarreal-Leal
01/07/2025	2.0	Design Clarification – Removed Portuguese as a language for the forms and general reformatting of design document.	Phong Xiong

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CA-282436 – Add Two New OPOI Informational Notices for IPV to the Template Repository

1 OVERVIEW

1.1 Current Design

Currently, the two of the Overpayment/Overissuance (OP/OI) Informational Notices for IPV are not available in Template Repository in CalSAWS.

1.2 Requests

Add two new OP/OI informational notices for Potential IPV CF 377.7H and CW 377 for CalWORKs.

1.3 Overview of Recommendations

1. Add the CF 377.7H form into the template repository.
2. Add the CW 377 form into the template repository.

1.4 Assumptions

1. There will be no automation and variable population logic for these two forms in this SCR.
1. This SCR will only implement the CW 377 and CF 377.7H. Any other IPV forms/NOAs will be implemented in the future.

2 RECOMMENDATIONS

2.1 Add the CF 377.7H CalFresh Informational Notice Potential Intentional Program Violation (IPV) (2/23) form Recommendations

2.1.1 Overview

The CF 377.7H form currently does not exist in CalSAWS and will be added into the template repository with this recommendation.

State Form: CF 377.7H (2/23)
Programs: CalFresh
Attached Forms: None
Forms Category: NOA
Template Repository Visibility: All Counties
Languages: English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, ~~Portuguese~~, Punjabi, Russian, Spanish, Tagalog, Thai, Ukrainian, Vietnamese

2.1.2 Form/NOA Verbiage

Create Form XDP
A new XDP is created for the CF 377.7H form.
Form Header: CalSAWS Standard Header (Header_1)
Form Title (Document List Page Displayed Name): CalFresh Informational Notice Potential Intentional Program Violation (IPV)
Form Number: CF 377.7H
Include NA Back 9: None

- **Includes standard NA Back 9 variable population:** No

Imaging Form Name: CF Informational Notice Potential IPV
Imaging Document Type: Notification/NOA
Imaging Case/Person: Case

Form Mockups/Examples: Supporting Document #1

2.1.3 Form/NOA Variable Population

There is no variable population logic for this form.

2.1.4 Form/NOA Generation Conditions

1. **Add Form to Template Repository**

   The CF 377.7H form is added to the template repository.
   Required Form Input: Case Number, Customer Name, Program, Language

2. **Add Form Control**

The CF 377.7H will have the following form controls
Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. **Add Form Print Options and Mailing Requirements**

The CF 377.7H will have the following Print Options and Mailing Requirements:

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

Mailing Requirements:
Mail-To (Recipient): Mail to the person selected from Customer Name dropdown menu on Document Parameters page.
Mailed From (Return): Sending Office
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard Envelope
Return Envelope Type: N/A

Additional Requirements:
Special Paper Stock: No
Enclosures: No
Electronic Signature: No
      Electronic Signature (IVR/Text): No
      Check to Sign: No
      Post to Self Service Portal: Yes

2.2 Add the CW 377 CalWORKs Informational Notice Potential Intentional Program Violation (IPV) (12/23) form Recommendations

2.2.1 Overview

The CW 377 currently does not exist in CalSAWS and will be added into the template repository with this recommendation.

State Form: CW 377 (12/23)
Programs: CalWORKs
Attached Forms: None
Forms Category: NOA
Template Repository Visibility: All Counties
Languages: English Arabic, Armenian, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, ~~Portuguese~~, Punjabi, Russian, Spanish, Tagalog, Thai, Ukrainian, Vietnamese

2.2.2 Form/NOA Verbiage

Create Form XDP
A new XDP is created for the CW 377 form.
Form Header: CalSAWS Standard Header (Header_1)
Form Title (Document List Page Displayed Name): CalWORKs Informational Notice Potential Intentional Program Violation (IPV)
Form Number: CW 377
Include NA Back 9: None

- **Includes standard NA Back 9 variable population:** No

Imaging Form Name: CW Informational Notice ~~for~~ Potential IPV
Imaging Document Type: Notification/NOA
Imaging Case/Person: Case

Form Mockups/Examples: Supporting Document #2

2.2.3 Form/NOA Variable Population

There is no variable population logic for this form.

2.2.4 Form/NOA Generation Conditions

1. **Add Form to Template Repository**

   The CW 377 form is added to the template repository.
   Required Form Input: Case Number, Customer Name, Program, Language

2. **Add Form Control**

   The CW 377 will have the following form controls:
   Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

3. **Add Form Print Options and Mailing Requirements**

   The CW 377 will have the following Print Options and Mailing Requirements:

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

   Mailing Requirements:
   Mail-To (Recipient): Mail to the person selected from Customer Name dropdown menu on Document Parameters page.
   Mailed From (Return): Sending Office
   Mail-back-to Address: N/A
   Outgoing Envelope Type: Standard Envelope
   Return Envelope Type: N/A

   Additional Requirements:
   Special Paper Stock: No
   Enclosures: No

Electronic Signature: No
Electronic Signature (IVR/Text): No
Check to Sign: No

Post to Self Service Portal: Yes

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	CF 377.7H Mockup	CF377.7H_EN.pdf
2	Forms	CW 377 Mockup	CW377_EN.pdf

CA-282638

Add Available Translations for AR 2 SAR to CalSAWS - Phase II

DOCUMENT APPROVAL HISTORY			
Prepared By	Justin Bourbonniere		
Reviewed By			

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
11/25/2024	1.0	Initial Draft	Justin Bourbonniere

CalSAWS

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CA-282638 – Add Available Translations for AR 2 SAR to CalSAWS - Phase II

1 OVERVIEW

This effort will add the available translations of the AR 2 SAR - Reporting Change for CalWORKs and CalFresh form in CalSAWS. The following translations are missing in CalSAWS are currently available on the CDSS website: Japanese, Mien.

1.1 Current Design

During the missing translations review the AR 2 SAR - Reporting Change for CalWORKs and CalFresh is available in CalSAWS, but some translations are missing.

1.2 Requests

Add available translations of the AR 2 SAR - Reporting Change for CalWORKs and CalFresh form in CalSAWS. The following translations are missing in CalSAWS and are currently available on the CDSS website: Japanese, Mien.

1.3 Overview of Recommendations

Add available translations for the 'AR 2 SAR - Reporting Change for CalWORKs and CalFresh' to CalSAWS to the Template Repository.

1.4 Assumptions

1. There are no other changes to the form's generation conditions or variable population logic, unless otherwise stated in this design document.

2 RECOMMENDATIONS

2.1 Update AR 2 SAR

2.1.1 Overview

This effort will add available translations for the 'AR 2 SAR - Reporting Change for CalWORKs and CalFresh' to the Template Repository.

State Form: AR 2 SAR (3/15)
Current Programs: CalFresh, CalWORKs
Current Attached Form(s): None

Current Forms Category: Forms
Current Template Repository Visibility: All counties
Existing Languages: Arabic, Armenian, Cambodian, Chinese, English, Farsi, Hmong, Korean, Lao, Punjabi, Russian, Spanish, Tagalog, Ukrainian, Vietnamese

2.1.2 Form Verbiage

Add available translations for the 'AR 2 SAR - Reporting Change for CalWORKs and CalFresh' to the Template Repository.

Added Languages: Japanese, Mien

Form Header: Header_1

Form Title:

- **Title listed on Template Repository/Document List page:** Reporting Changes for CW AR/CO and CF SAR
- **Title printed on the Form:** Reporting Changes for CW AR/CO and CF SAR

Form Number: AR 2 SAR

Template Repository Visibility: All counties

Include NA Back 9: N

- **Includes standard NA Back 9 variable population:** N

Imaging Form Name: Reporting Changes for CW AR/CO & CF SAR

Imaging Case/Person: Case

Imaging Document Type: Customer Reporting

Form Mockups/Examples: See Supporting Documents #1-2

Technical note: Translations provided by CDSS, a mockup with CalSAWS header is not provided. Threshold languages should use the same header as the English AR 2 SAR (Header_1).

2.1.3 Form Generation Conditions

There are no changes to this section.

2.1.4 Form Variable Population

There are no changes to this section.

2.1.5 Add Form Control

There are no changes to this section. See Appendix section for current form information.

2.1.6 Form Print Options and Mailing Requirements

There are no changes to this section. See Appendix section for current form information.

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
#1	Client Correspondence	AR 2 SAR Japanese	AR_2_SAR_Japanese.pdf
#2	Client Correspondence	AR 2 SAR Mien	AR_2_SAR_Mien.pdf

4   APPENDIX

4.1.1   2.1.5 Add Form Control

There are no changes to this section, provided for reference only.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

4.1.2   2.1.6 Form Print Options and Mailing Requirements

There are no changes to this section, provided for reference only.

The print options checked below will be available for this form.

Blank Template	Print Local Without Save	Print Local And Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

The PRINT LOCAL WITHOUT SAVE option is only available when printing a blank template.

The PRINT AND SAVE options are only available when printing a document containing case or resource information.

Mailing Requirements:

Mail-To (Recipient): Customer selected on Document Parameters Page

Mailed From (Return): Worker's office

Mail-back-to Address: N/A

Outgoing Envelop Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature: No

Check to Sign: No

Post to SSP: Yes

5   REQUIREMENTS

REQ #	REQUIREMENT TEXT	HOW REQUIREMENT MET
2.18.2.1 CAR-1223	The LRS shall include standard electronic templates for all notices, NOAs, forms, letters, stuffers, and flyers that can be easily maintained by non-technical COUNTY-specified Users.	Add AR 2 SAR translations to the Template Repository.

CalSAWS

California Statewide Automated Welfare System

Design

CA-283156

MEDS: Deactivate Alert 9019 and Exclude from Inbound Reader

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Erika Kusnadi, Shining Liu	
	Reviewed By		
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
12/6/2024	1.0	Initial draft	Erika Kusnadi, Shining Liu

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[CA-283156 – MEDS: Deactivate Alert 9019 and Exclude from Inbound Reader]

1 OVERVIEW

1.1 Current Design

MEDS Alert '9019 - MEDS SHOWS FOOD STAMP CLIENT CURRENTLY RECEIVING SSI/SSP' is included in the PI19C43211 batch. When the Case Update Status field on the MEDS Alert Admin Detail page is set to 'Active', this batch updates the Other Program Assistance page in CalSAWS to indicate the individual identified in the alert is currently receiving SSI/SSP.

MEDS Alert 9019 has been obsolete since 01/27/2020 and contains inaccurate information. When the Case Update Status on the MEDS Alert Admin Detail page is set to "Active" for MEDS Alert 9019, erroneous SSI/SSP eligibility is added to the corresponding data page, causing the individual to be discontinued when the monthly SSI/SSP batches are processed.

DHCS has created a Work Effort to research and identify the reason it continues to be sent with the daily MEDS Inbound file. In the meantime, DHCS has confirmed Alert 9019 should not be loaded into CalSAWS when received with the daily MEDS Inbound files.

1.2 Requests

Prevent modification of the status of MEDS Alert 9019 on the MEDS Alert Admin Detail page. Exclude any received MEDS Alert 9019 in daily MEDS inbound files from being loaded into CalSAWS and deactivate MEDS Alert 9019.

1.3 Overview of Recommendations

1. Update the Alert Status field on the MEDS Alert Admin Detail page to no longer be editable for Alert ID '9019'.
2. Exclude MEDS Alert 9019 from being loaded into CalSAWS when received in daily MEDS inbound files.
3. Create a data change to change the Case Update Status and Alert Status of MEDS Alert 9019 to 'Inactive'.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.

2 RECOMMENDATIONS

2.1 MEDS Alert Admin Detail

2.1.1 Overview

The MEDS Alert Admin Detail page allows users to view and configure information on MEDS Alerts and their associated Tasks. This SCR will update the MEDS Alert Admin Detail page to make the Alert Status field for MEDS Alert '9019 - MEDS SHOWS FOOD STAMP CLIENT CURRENTLY RECEIVING SSI/SSP' to be in Inactive status and making it un-editable as the MEDS Alert 9019 has been obsolete since 01/27/2020 and contains inaccurate information

2.1.2 MEDS Alert Admin Detail Mockup

MEDS Alert Admin Detail

* - Indicates required fields

[Save and Return] [Cancel]

MEDS Alert Information

Alert ID:
9019

Alert Description:
MEDS SHOWS FOOD STAMP CLIENT CURRENTLY RECEIVING SSI/SSP

Alert Type:
ACTION

Alert Status:
Inactive

Case Update Information

Case Update:
SSI recipient information is updated for the person CIN.

Case Update Status: *
Inactive

Journal Entry:
Based on information received via the MEDS Interface, the individual with the following CIN {cinNo} is receiving SSI/SSP. MEDS Interface has updated the SSI/SSP fields. Please review the case to determine if further action is needed.

Task Information

Type:
[▼]

Status: *

Due Date:
[Default Due Date   ▼]

Default Due Date:
10 days

Initial Assignment:
[Default Assignment ▼]

Default Assignment:
MEDS Alert Task Distribution

Sibling Assignment:
[No ▼]

Program Priority:
[▼]

Long Description:
MEDS Alert {Alert ID} - {Alert Description} has been received.

▸ History

[Save and Return] [Cancel]

This Type 1 page took 0.83 seconds to load.

Figure 2.1.1 – MEDS Alert Admin Detail in Edit mode

2.1.3 Description of Changes

1. Update the Alert Status field on the MEDS Alert Admin Detail page for Alert ID '9019' to no longer be editable when the page is in Edit mode.

   Note: The Case Update Status field on the Case Update Information section and the Status field on the Task Information section will automatically be un-editable as well as currently functionality both fields become un-editable when the Alert Status is 'Inactive'.

   Note: Section 2.3 will do the data change that will update both the Alert Status and the Case Update Status to Inactive for all 58 counties.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: MEDS Alert Admin**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

Accessibility was assessed and no changes are needed.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Modify MEDS Alert Inbound Reader Job

2.2.1 Overview

MEDS Alert 9019 is received through the daily MEDS inbound files. Modify the daily MEDS inbound reader jobs (PIXXE419) to exclude loading any MEDS Alert 9019 into CalSAWS.

2.2.2 Description of Change

1. Modify the daily MEDS alert inbound reader jobs to exclude any MEDS Alert 9019 received in the files from being loaded into CalSAWS.

2.2.3 Partner Integration Testing

N/A

2.2.4 Execution Frequency

No change

2.2.5 Key Scheduling Dependencies

No change

2.2.6 Counties Impacted

All counties

2.2.7 Category

No change

2.2.8 Data Volume/Performance

N/A

2.2.9 Interface Partner

Department of Health Care Services (DHCS).

2.2.10 Failure Procedure/Operational Instructions

No change

2.3 Data Change – Set MEDS Alert 9019 to 'Inactive'

2.3.1 Overview

MEDS Alert 9019 should be deactivated.

2.3.2 Description of Change

1. Create a data change to set the Case Update Status and Alert Status of MEDS Alert 9019 to 'Inactive' for all counties.

2.3.3 Estimated Number of Records Impacted/Performance

58 records

2.4 Automated Regression Test

2.4.1 Overview

Review the existing MEDS Alert automated regression test scripts and update any applicable database queries to exclude Alert 9019 from being returned.

2.4.2 Description of Change

1. Review the data retrieval queries used by the existing regression scripts that utilize MEDS Alert functionality. Update any queries that could retrieve Alert ID 9019 to specifically exclude this value.
    Technical Note: At the time of design preparation, no regression scripts met this condition.

CA-284600

Add a Complete/Incomplete indicator for Medi-Cal program.

Table of Contents1   Overview 1

[CA-284600 – Add a Complete/Incomplete indicator for Medi-Cal program]

1 OVERVIEW

As part of the monthly Performance Indicators report that it is to be submitted to the Centers for Medicare & Medicaid Services (CMS), one of the data points that will need to be captured is to determine whether an application was complete or incomplete at the time of submission for Medi-Cal program. At this time in CalSAWS, users are not able to indicate whether the application that was received was complete or incomplete. This SCR will make updates to CalSAWS that will add the ability for a user to indicate whether a Medi-Cal program application was complete or incomplete at the time that it was received.

1.1 Current Design

Currently in CalSAWS users are not able to indicate whether an application for Medi-Cal program was complete or incomplete at the time it was received.

1.2 Requests

Update CalSAWS to allow users to indicate whether an application for Medi-Cal program was complete or incomplete at the time it was received.

1.3 Overview of Recommendations

1. Add a new button to the Medi-Cal Program block found on the Case Summary page to access the newly created Medi-Cal Application Completeness Detail page.
2. Create a new Medi-Cal Application Completeness Detail page that allows user to indicate whether the Medi-Cal Application was complete or incomplete at the time it was received.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. DHCS will provide users guidance on determining whether an application for Medi-Cal Program is complete or incomplete at the time it was received.
3. Users will need to manually determine whether an application for Medi-Cal Program is complete or incomplete.
4. The indicator to determine whether an application is complete ("Blank", "Yes" or "No") when the Medi-Cal application is received will not be tracked when the status is changed by a user.

5. SCR CA-270511 will be the SCR to update the DHCS CMS PI report to include information whether an application was complete at the time it was received.
6. There is no requirement for user to input the information on whether the application was complete or not at the time it was received to be set before, during, or after the application processing.
7. The option of "Blank" on the drop-down field for the "Was the Application Complete?" field means it has not been accessed or the information is not known (example: historical records).

2 RECOMMENDATIONS

As part of the monthly Performance Indicators report that it is to be submitted to the Centers for Medicare & Medicaid Services (CMS), one of the data points that will need to be captured is to determine whether an application was complete or incomplete at the time of submission for Medi-Cal program. At this time in CalSAWS, users are not able to indicate whether the application that was received was complete or incomplete. This SCR will make updates to CalSAWS that will add the ability for a user to indicate whether a Medi-Cal program application was complete or incomplete at the time that it was received.

2.1 Case Summary

2.1.1 Overview

The Case Summary page allows users to access the case summary of an entire case, including summaries of the programs on the selected case. This SCR will add a new button to the Medi-Cal program block that will access the newly created Medi-Cal Application Completeness Detail page.

2.1.2 Case Summary Mockup

Figure 2.1.1 – Medi-Cal Program Block

2.1.3 Description of Changes

1. Add a new button to the Medi-Cal program block found on the Case Summary Page.
   a. New button will be titled 'Application Completeness'.
   b. Clicking on the 'Application Completeness' button will take user to the 'Medi-Cal Application Completeness Detail' page (this is a new page that is being created as part of this SCR. Please see Section 2.2 for more details.
   c. The new button will be protected by the 'ProgramDetailEdit' Security Right.
      i. Users that are not assigned to the 'ProgramDetailEdit' security right will not see the button.

Note: The new 'Application Completeness' button will only be found on the Medi-Cal Program block.

Note: The 'ProgramDetailEdit' security right is an existing security right (this is the same security right for the 'Edit' button on the Medi-Cal Detail page.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A – The 'ProgramDetailEdit' security right is an existing security right in CalSAWS.

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

The following Accessibility enhancements have been identified:
- Headings should not be empty
- Table header text should not be empty

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Medi-Cal Application Completeness Detail

2.2.1 Overview

A new page to be created that allow users to indicate whether the Medi-Cal application was complete or incomplete when it was received.

2.2.1.1 Medi-Cal Application Completeness Detail Mockup

Medi-Cal Application Completeness Detail

✱- Indicates required fields   [Save and Return] [Cancel]

Medi-Cal Application Completeness Information

App #	App Date	Application Type	Was Application Complete when Submitted?
3	08/08/2024	Reapplication	⌄
2	05/03/2023	Reapplication	⌄
1	11/19/2022	New Application	⌄

[Save and Return] [Cancel]

Figure 2.2.1 – Medi-Cal Application Completeness Detail page.

2.2.2 Description of Changes

1. Create a new page title 'Medi-Cal Application Completeness Detail'.
   a. This page will be accessible when user clicks on the 'Application Completeness' button (please refer to Section 2.1 for more details on this button) found on the Medi-Cal Program block on the 'Case Summary' page.
   b. The page will have the following elements:
      i. A section title 'Medi-Cal Application Completeness Information' which will have the following columns:

1. App#
   a. Display the order of the applications on the timeline.

   Note: This will display the same information as of the 'App#' column found on the 'Program Application History' section on the 'Medi-Cal History' page.

2. App Date
   a. Display the application date in the format of MM/DD/YYYY.
   b. Display the application date as a hyperlink.
      i. Clicking on the date hyperlink will take the user to the 'Program History Detail' page for that specific application.
         1. Clicking the 'Close' button from the 'Program History Detail' page will take the user back to the 'Medi-Cal Application Completeness Detail' page.
         Note: User will only be re-directed back to the 'Medi-Cal Application Completeness Detail' page when the 'Close' button is click and the 'Program History Detail' page was access by clicking on the application date hyperlink on the 'Medi-Cal Application Completeness Detail page'.

   Note: This will display the same information as of the 'App Date' column found on the 'Program Application History' section on the 'Medi-Cal History' page.

3. Application Type
   a. Display the application type for the corresponding application.
   Note: This will display the same information as of the 'Application Type' column found on the 'Program Application History' section on the 'Medi-Cal History' page.

4. Was Application Complete when Submitted?
   a. This will be an editable drop-down field that will have the following options:
      i. 'Blank' (this will be default value)
      ii. 'Yes'
      iii. 'No'

ii. 'Save and Return' button
   1. Clicking on the 'Save and Return' button will save the information on the page and take the user back to the 'Case Summary' page that they were on prior to

accessing the 'Medi-Cal Application Completeness Detail' page.

    iii. 'Cancel' button

        1. Clicking on the 'Cancel' button will take the user back to the 'Case Summary' page that they were on prior to accessing the 'Medi-Cal Application Completeness Detail' page.

            a. Any changes that were made on the page, will not be saved.

2.2.3 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Case Summary → Medi-Cal Program block → Application Completeness button.**

2.2.4 Security Updates

N/A

2.2.5 Page Mapping

Create page mapping for the new page that is being created.

2.2.6 Accessibility

Ensure that Accessibility requirements are met for the newly created page.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Automated Regression Test

2.3.1 Overview

Create automated regression test scripts to verify that the user can navigate to the Medi-Cal Application Completeness Detail page in the context of a case with a Medi-Cal program, and that this page can be saved with each 'Was the Application Complete?' value selected.

2.3.2 Description of Changes

1. Create regression scripts to verify the following:
   a. The 'Application Completeness' button is available in the Medi-Cal program block on the Case Summary page.
   Technical Note: Negative testing of user security rights is out of scope.

b. Clicking the 'Application Completeness' button on the Case Summary page navigates the user to the Medi-Cal Application Completeness Detail page in edit mode.

c. The Medi-Cal Application Completeness Detail page can be saved with each available value selected from the 'Was the Application Complete?' drop list.
Technical Note: This may be verified individually, or in combination with different values selected for multiple applications associated to the same program.

2. Create regression scripts to verify that a page mapping entry exists for each applicable field on the following page:

a. Medi-Cal Application Completeness Detail

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-266758

Update MAGI Request logic for closed members

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Noel Acosta
	Reviewed By	Tisha Mutreja, Geetha Ramalingam, Dylan Patel, Maksim Volf, William Baretsky, Renee Gustafson, Sourabh Bhatia

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/17/2024	.01	Initial Draft	Noel Acosta
09/24/2024	.5	Minor language updates for consistency and Updated mockups. Noted that Auto-Test Medi-Cal should also should also end-date Negative Action MAGI Configuration records. Noted that the Negative Action MAGI Configuration would take precedence over pre-existing logic to set auto-set the Negative Action Reason. Removed 'Gets APTC' from the List of Negative Action Reason Drop List options.	Noel Acosta
09/25/2024	1.0	Updated Recommendation #3 to expand the criteria to consider both Open Medi-Cal and Cash-based Medi-Cal programs on other cases. Added recommendation for a Journal Entry when the Negative Action MAGI Configuration is automatically end-dated.	Noel Acosta
09/26/2024	1.1	Added recommendation for updating the Journal Entry on delete functionality introduced with SCR CA-279622. Minor verbiage corrections.	Noel Acosta
10/10/2024	1.2	Added note clarifying explaining the general use case for Negative Action MAGI Configuration. Made minor updates to the Fact Sheet Table #3 for Negative Action.	Noel Acosta
11/14/2024	1.3	Added hard page validation and minor clarifications	Noel Acosta
11/27/2024	2.0	==Content Revision:== ==Added sub-recommendation==	Noel Acosta

		2.1.3.5.a for deleting a Negative Action MAGI Configuration record with a Begin Month that is on or after the Begin Month of the individual's Pend/Reapp/Rescind Month. Clarified criteria for recommendations under 2.2.2 Updated Fact Sheet Table #3 for clarity.	

Table of Contents

1 OVERVIEW

CalSAWS uses the CalHEERS electronic Health Information Transfer (eHIT) Interface to communicate Medi-Cal applicant/recipient information to CalHEERS for Modified Adjusted Gross Income (MAGI) Medi-Cal eligibility determination. Part of the information that is communicated to CalHEERS includes an indicator that represents whether an individual in the MAGI Request is requesting to be evaluated for MAGI Medi-Cal or not. CalHEERS will receive the MAGI Request, evaluates the information sent by CalSAWS and returns a MAGI Determination with the MAGI Eligibility of the individuals who were applying for MAGI Medi-Cal.

CalSAWS will update the logic for automatically setting the 'Applying for Health Coverage' indicator along with adding new functionality to drive automatically setting a Negative Action Reason for Closed case members in MAGI Requests.

1.1 Current Design

Currently there is no way to set the Negative Action Reason for a Closed Medi-Cal individual. If there is a need to apply a Negative Action for the Closed Medi-Cal individual, the worker would need to first Rescind or Re-apply the individual to the program.

Additionally, when an individual is Discontinued due to being over income, we keep sending that person to CalHEERS as an Applying Member with the rest of the household. If their income drops again, CalHEERS will be able to determine them as Eligible and that will either prompt a Rescind or Re-application to the user (if Discontinued) or just automatically put them on aid the next time EDBC runs (if Active FRI). With SCR CA-279622, greater control was made available to the user in setting the Applying for Health Coverage indicator in MAGI Requests via a MAGI Configuration but there is still a need to automatically set the flag in a situation where the Closed individual may be applying for Medi-Cal under a different case and a MAGI Configuration has not been established for the member already.

1.2 Requests

Add a new MAGI Configuration Type which will be used to explicitly control the Negative Action Reason triggered on a MAGI Request for Closed individuals.

Additionally, make an update to the MAGI Request logic to automatically set the Applying for Health Coverage indicator as No when a Closed individual is Open on Medi-Cal on another case.

1.3 Overview of Recommendations

1. Add a new 'Negative Action' MAGI Configuration Type Record which will be available to add to the case from the MAGI Configuration List and Detail pages

2. Update eHIT MAGI Request logic to set the 'Negative Action Reason' for Closed individuals based on the 'Negative Action' MAGI Configuration Type Record associated to them
3. Update eHIT MAGI Request logic to automatically send a Closed Medi-Cal individual on the case as 'Not Applying for Aid' when they have an Open Medi-Cal application or Cash-based Medi-Cal on another case

1.4 Assumptions

1. Fields not mentioned to be modified within the online pages 'Description of Changes' will retain their current functionality.

2   RECOMMENDATIONS

Add a new MAGI Configuration Type to be used to set the Negative Action Reason automatically in MAGI Requests.

Update the eHIT MAGI Request logic for Closed individuals that are Open on Medi-Cal on another case.

2.1   MAGI Configuration Detail Page Updates

2.1.1   Overview

Create a new MAGI Configuration Type Record for Negative Action which will be used to auto-populate the Negative Action Reason on subsequent MAGI Requests for Closed individuals

2.1.2   Negative Action MAGI Configuration Detail Mockups

MAGI Configuration Detail

*- Indicates required fields   [Save and Return] [Cancel]

Type: *
[Negative Action ▾]

Name: *
[- Select - ▾]

Negative Action Reason: *
[- Select - ▾]

Begin Month: *
[_____] 📅

End Month:
[_____] 📅

[Save and Return] [Cancel]

This Type 1 page took 0.35 seconds to load.

MAGI Configuration Detail

*- Indicates required fields   [Save and Return] [Cancel]

Type: *
[Negative Action ▾]

Name: *
[- Select - ▾]
[- Select -]
[McClean, Timothy 23M]

Negative Action Reason: *
[- Select - ▾]

Begin Month: *
[_____] 📅

End Month:
[_____] 📅

[Save and Return] [Cancel]

This Type 1 page took 0.35 seconds to load.

MAGI Configuration Detail

*- Indicates required fields   [Save and Return] [Cancel]

Type: *
[Negative Action ▾]

Name: *
[McClean, Timothy 23M ▾]

Negative Action Reason: *
[Failed to Complete Redetermination ▾]

Begin Month: *
[09/2024] 📅

End Month:
[_____] 📅

[Save and Return] [Cancel]

This Type 1 page took 0.35 seconds to load.

Figure 2.1.2a – MAGI Configuration Detail with Negative Action record – Create Mode

MAGI Configuration Detail

✱- Indicates required fields

[Edit] [Close]

Type: ✱
Negative Action

Name: ✱
McClean, Timothy 23M

Negative Action Reason: ✱
Failed to Complete Redetermination

Begin Month: ✱
09/2024

End Month:

[Edit] [Close]

Last Updated On 09/24/2024 2:44:14 PM By: 1002193

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Figure 2.1.2b – MAGI Configuration Detail with Negative Action record – View Mode

MAGI Configuration Detail

✱- Indicates required fields

[Save and Return] [Cancel]

Type: ✱
Negative Action

Name: ✱
McClean, Timothy 23M

Negative Action Reason: ✱
Failed to Complete Redetermination ▾

Begin Month: ✱
09/2024

End Month:
12/2024

[Save and Return] [Cancel]

Last Updated On 10/13/2024 2:44:14 PM By: 1002193

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Figure 2.1.2c – MAGI Configuration Detail with Negative Action record – Edit Mode

Figure 2.1.2d – MAGI Configuration Detail with Negative Action record – Hard Validation

2.1.3 Description of Changes

1. Add a new 'Negative Action' MAGI Configuration Type to the Code Category introduced by SCR CA-279622
2. Update the MAGI Configuration Detail page to only display applicable case members as available options in the Name Drop List that are not hidden nor marked as duplicate and do not have a high-dated Open Medi-Cal Application on the case when Negative Action is selected as the Type
3. Update the MAGI Configuration Detail Page to dynamically display a new Drop List field called 'Negative Action Reason' that will capture the Negative Action Reason desired by the user as seen in the Figure 2.1.2* Mockups
    a. The list of available drop-down options for Negative Action Reason are as follows:
        i. Application Opened in Error
        ii. Calif. Residence
        iii. Child Applied for Self
        iv. Deceased
        v. Deemed Child - Fam ReApp
        vi. Duplicate Application
        vii. Failed to Complete Determination
        viii. Failed to Complete Redetermination
        ix. Gets SSI
        x. Non-Payment of Premium
        xi. On Aid Another Case
        xii. Requested Disc. - Written

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        xiii.   Stop Aid for Optional Member
        xiv.   TMC Report Incomplete
        xv.   TMC Report Not Recvd
        xvi.   Whereabouts Unknown
        xvii.   Written Withdrawal

4. Add the new 'Negative Action Reason' field to be tracked in Transaction History Detail for the MAGI Configuration Detail Page record

5. Add automatic end-dating functionality to end-date an effective high-dated 'Negative Action' MAGI Configuration record when the Closed individual w/ the 'Negative Action' MAGI Configuration is reopened to high-date to Medi-Cal on the case via Rescind, Reapply, New Program App or Medi-Cal Auto-Test

    a. If the Closed individual is reopened to high-date to Medi-Cal on the case effective on or prior to the Begin Month of an existing 'Negative Action' MAGI Configuration for the individual, delete the 'Negative Action' MAGI Configuration entirely.

6. Create a new Journal Template (CT363_XX) with the following:

    a. **Journal Category:** All
    b. **Journal Type:** Data Removed
    c. **Short Description:** [Last Name], [First Name]'s Negative Action MAGI Configuration record end-dated.
    d. **Long Description:**

    > Negative Action MAGI Configuration record for [Last Name], [First Name] was end-dated as [Worker Name] reopened the member to Medi-Cal.

    > MAGI Configuration Negative Action Reason: [MAGI Configuration Negative Action Reason Value]

    > MAGI Configuration Begin Month: [MAGI Configuration Begin Month]

    > MAGI Configuration End Month: [MAGI Configuration End Month]

7. Use the Journal Template (CT363_XX) above to create a Journal Entry when the 'Negative Action' MAGI Configuration record is end-dated automatically when the associated member is reopened to Medi-Cal on the case

8. Update the functionality for Journal Entry on deletion of MAGI Configuration records as introduced with SCR CA-279622 to populate the Negative Action Reason as the MAGI Configuration Value in the Journal's Long Description

9. Add the following hard validation message upon saving the 'Negative Action' MAGI Configuration Record when the given date range overlaps with a period where the individual is Open on Medi-Cal on the case:

    a. The record cannot be saved as the individual is not Denied or Discontinued in the Begin Month and/or all subsequent months within the date range. The individual is Denied or Discontinued from <MM/YYYY> Benefit Month to high-date.

Technical Note: When the individual has multiple high-dated Denied and/or Discontinue dates, use the latest to populate the Benefit Month variable in the hard validation message.

Note: The general use case for the 'Negative Action' MAGI Configuration is to save the County Eligibility Worker from needing to Reopen/Pend an already Closed Medi-Cal individual just to send a 'Negative Action' MAGI Request on them to CalHEERS. This is common when an Unsolicited DER is received having a Closed, Out of the Home, Medi-Cal individual with unexpected MAGI Eligibility (for example MAGI Discontinuance in Awaiting Review, MAGI Pending, etc.) for any number of reasons. In this example, if the Closed individual is included in the EDR, a 'Negative Action' MAGI Configuration record would automatically set the Negative Action Reason in subsequent MAGI Requests to Close their Medi-Cal eligibility in CalHEERS without the need to Reopen/Pend the individual back to Medi-Cal in CalSAWS only to Close them again.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI > MAGI Configuration > MAGI Configuration List

2.1.5 Security

No changes

2.1.6 Page Mapping

Add page mapping for the new field.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 eHIT MAGI Request

2.2.1 Overview

Update CalHEERS eHIT MAGI Request logic to apply the Negative Action Reason selected in the MAGI Configuration record, effective for the Benefit Month for the applicable Closed individuals.

Update CalHEERS eHIT MAGI Request logic to set the 'Applying for Health Coverage' indicator as 'No' automatically for Closed individuals that have an Open Medi-Cal application or Cash-based Medi-Cal on another case.

2.2.2 Description of Changes

1. Update eHIT MAGI Request logic to apply the Negative Action Reason in the MAGI Configuration record using the following criteria:
   a. **Criteria:**
      i. There is a MAGI Configuration Record of Type 'Negative Action' effective for the Benefit Month.
      ii. The individual does not have an Open Medi-Cal Application on the case effective for the Benefit Month of the MAGI Request

   Technical Note: If the system is already automatically setting the Negative Action Reason in eHIT MAGI Requests for a Closed individual, the 'Negative Action' MAGI Configuration Record would take precedence.

2. Update eHIT MAGI Request logic to set the 'Applying for Health Coverage' indicator as 'No' using the following criteria:
   a. **Criteria:**
      i. Individual does not have an Open Medi-Cal application on the case
      ii. Individual has a 'Permanently Out of the Home' Household Status Record effective for the Benefit Month being requested via MAGI
      iii. Individual has an Open Medi-Cal application on another case
      iv. Individual does not have an 'Applying for Health Coverage' MAGI Configuration record answered as Yes effective for the Benefit Month being requested via MAGI

2.2.3 Interface Partner

CalHEERS

2.2.4 eHIT Schema Version

No change

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify Type 'Negative Action' is available on the MAGI Configuration Detail page, the expected 'Negative Action Reason' values are available when this Type is selected, and changes to these fields can be reviewed on the Transaction History Detail page.

Create new automated regression test scripts to verify that when the person associated to a MAGI Configuration Detail record with Type 'Negative Action' is re-opened on a Medi-Cal program, the MAGI Configuration Detail record is end-dated or removed and a journal entry is created.

2.3.2 Description of Change

1. Create regression scripts to verify the following:
   a. 'Negative Action' can be selected from the Type dropdown on the MAGI Configuration Detail page in create mode.
   b. When 'Negative Action' is selected from the Type dropdown on the MAGI Configuration Detail page in create or edit mode, the 'Negative Action Reason' dropdown displays with the following selectable values:
      i. Application Opened in Error
      ii. Calif. Residence
      iii. Child Applied for Self
      iv. Deceased
      v. Deemed Child - Fam ReApp
      vi. Duplicate Application
      vii. Failed to Complete Determination
      viii. Failed to Complete Redetermination
      ix. Gets SSI
      x. Non-Payment of Premium
      xi. On Aid Another Case
      xii. Requested Disc. - Written
      xiii. Stop Aid for Optional Member
      xiv. TMC Report Incomplete
      xv. TMC Report Not Recvd
      xvi. Whereabouts Unknown
      xvii. Written Withdrawal
   c. When saving the MAGI Configuration Detail page with Type 'Negative Action' and a date range that overlaps an existing

record of the same type, the Effective Dating Confirmation List page displays. Clicking the Save button adjusts the dates of the new and/or existing record to not overlap.

    d. When attempting to save the MAGI Configuration Detail page with Type 'Negative Action' and a date range that overlaps a period where the individual is open on a Medi-Cal program on the case, a validation message displays preventing the page from being saved.

    e. When a person with an associated MAGI Configuration record of type 'Negative Action' is re-opened on a Medi-Cal program with an effective date after the Begin Month of the MAGI Configuration record:

        i. The End Date of the MAGI Configuration record is added / updated to the month before the new Pending status.

        ii. A journal entry is created stating the 'Negative Action' MAGI Configuration record was end-dated, with the Negative Action Reason value populated.

    Technical Note: At least one, but not all, methods of re-opening a person noted in Section 2.1.3 #5 will be verified.

    f. When a person with an associated MAGI Configuration record of type 'Negative Action' is re-opened on a Medi-Cal program with an effective date matching the Begin Month of the MAGI Configuration record:

        i. The MAGI Configuration record is removed.

        ii. A journal entry is created indicating that the MAGI Configuration record was removed, with the Negative Action Reason value populated.

    Technical Note: At least one, but not all, methods of re-opening a person noted in Section 2.1.3 #5 will be verified.

2. Create regression scripts to verify that a Page Mapping entry for each applicable field exists for the following page:

    a. MAGI Configuration Detail

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Updated Logic	Updated Logic to determine if an individual is included in a MAGI Request and how the Applying for Health Coverage Indicator is set	Fact Sheet

4   REQUIREMENTS

Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.5.4.1	The LRS shall include the ability to add, close, transfer, and change cases as appropriate.	This SCR added an additional MAGI Configuration Type and updates MAGI Request logic