



California Statewide Automated Welfare System

Design Document

CA-261385

Update Time Limit Generation for Discontinued
Persons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Vicente Romero
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/27/2023	1.0	Initial Revision	Vicente Romero
12/27/2024	1.1	Changes to M40-107B generations to trigger when at least one month has been used And Clarifications to the Verifications to ignore verifications for records that have a date received or marked as Not Applicable	Jose Gonzales

Table of Contents

1. Overview	4
1.1. Current Design.....	4
1.2. Requests.....	4
1.2. Overview of Recommendations.....	4
1.3. Assumptions	4
2. Recommendations	5
2.1. Update M40-107B Time Limit Notice trigger	5
2.2. Overview.....	5
2.3. NOA Reason Verbiage	5
2.4. NOA Reason Variable Population	5
2.5. NOA Reason Fragment Generation	5

3.	Update M40-107A Time Limit Notice trigger	6
3.1.	Overview	6
3.2.	NOA Reason Verbiage	6
3.3.	NOA Reason Variable Population	6
3.4.	NOA Reason Fragment Generation	6
4.	Update Failed to Provide Verification Rules	6
4.1.	Overview	6
4.2.	NOAStatusReasons Impacted Rules	7
5.	Update M40-107G Time Limit Notice	7
5.1.	Overview	7
5.2.	NOA Reason Verbiage	8
5.3.	NOA Reason Variable Population	8
5.4.	NOA Reason Fragment Generation	8
6.	Automated Regression Test	8
6.1.	Overview	8
6.2.	Description of Changes	8
7.	Supporting Documents	9

1. OVERVIEW

1.1. Current Design

CalSAWS currently is generating M40-107A at intake and redetermination if a previous time limit NOA was not sent to a participant and the number of time limit months used are between 1 month and 12 months. M40-107B is generating at intake and redetermination if a previous time limit NOA was sent to a participant and **the person has used at least one month of aid** AND has not exhausted the 60 countable months of aid. Currently both M40-107A and M40-107B are generating for individuals denied or discontinued.

CalSAWS has logic that determines statuses for "Failed to Provide" various verification statuses. This logic currently does not consider 'NA' Status nor does it consider records that have been received and set to 'NA' to set statuses. For example: it will set "Failed to Provide Income" when the verification record has been set to 'NA' or has been **received**. This would cause CalSAWS to generate unwanted notices due to verification records set to 'NA'.

M40-107G generates for CalWORKs program when a time limit participant reaches his/her 60th countable month. The current benefit amount is less than the prior benefit amount and there is no time limit extender for the current month or the previous month. The role reason for the participant will be 'CW Time Limit'. M40-107G is currently using potential amount instead of authorized amount.

1.2. Requests

1. Update M40-107A and M40-107B to only trigger for participants that are active in CalWORKs program.
2. Update Failed to Provide Verification rules that exist in NOAStatusReasons rule sets to ignore records with 'NA' status and records that have been **received**.
3. Update M40-107G to use authorized amount instead of potential benefit amount.

1.3. Overview of Recommendations

1. Update M40-107A and M40-107B to only trigger for participants that are active.
2. Update Failed to Provide Verification rules that exist in NOAStatusReasons rule sets to ignore records with 'NA' status and records that have been **received**.
3. Update M40-107G to use authorized amount instead of potential benefit amount.

1.4. Assumptions

1. No verbiage will be updated as part of this SCR.

2. Threshold Languages will not be added as part of this SCR.

2. RECOMMENDATIONS

1.1 Update M40-107B Time Limit Notice trigger

2.1. Overview

Update M40-107B Time on Aid NOA to trigger for participants that are currently active for CalWORKs program.

State Form/NOA: M40-107B

Known County NOA: CW_IN_TL_60_REDETERM_EXEMPTS_AND_CS_A416 (Id: 9582)

Current NOA Template: CW_TL_60_NOA_TEMPLATE (Fragment ID = 3044)

Current Program(s): CalWORKs

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English, Spanish

2.2. NOA Reason Verbiage

No verbiage will be updated as part of this SCR.

2.3. NOA Reason Variable Population

No variable population will be updated as part of this SCR.

2.4. NOA Reason Fragment Generation

Update Fragment Generation

Update M40-107B Notice to only trigger for participants that are currently active on the CalWORKs program. Notice should not trigger for denied or discontinued participants.

3. UPDATE M40-107A TIME LIMIT NOTICE TRIGGER

3.1. Overview

Update M40-107A Time on Aid NOA to trigger for participants that are currently active on the case.

State Form/NOA: M40-107A

Known County NOA: CW_AP_IN_TL_60_REDETERM_EXEMPTS_AND_CS_A422 (Id: 9588)

Current NOA Template: CW_TL_60_NOA_TEMPLATE (Fragment ID = 3044)

Current Program(s): CalWORKs

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English, Spanish

3.2. NOA Reason Verbiage

No verbiage will be updated as part of this SCR.

3.3. NOA Reason Variable Population

No variable population will be updated as part of this SCR.

3.4. NOA Reason Fragment Generation

Update Fragment Generation

Update M40-107A Notice to only trigger for participants that are currently active on the CalWORKs program. Notice should not trigger for denied or discontinued participants. Remove the 1 to 12 countable month restriction and replace it with the following condition:

This notice will trigger when the person has used at least one month of aid AND has not exhausted the 60 countable months of aid.

4. UPDATE FAILED TO PROVIDE VERIFICATION RULES

4.1. Overview

NOAStatusReasons ruleset holds several rules that determine if a participant should be given a status due to Failing to Provide verifications. Update these

rulesets to prevent unwanted notices from generating when a verification status has been set to 'NA'.

4.2. NOAStatusReasons Impacted Rules

Rules should not set 'Failed to Provide' status for Verification record that have a **Date Received** or records that have 'Not Applicable' status. Rules listed should be updated when applicable. Existing conditions should continue to work the same and should only add the two conditions added by this recommendation.

List of Impacted Rules

_500NoaStatusReasonFtpCitizenship.trl
_500NoaStatusReasonFtpExpenseDependentCare.trl
_500NoaStatusReasonFtpExpenseMedical.trl
_500NoaStatusReasonFtpExpenseShelter.trl
_500NoaStatusReasonFtpExpenseUtility.trl
_500NoaStatusReasonFtpIncomeEarned.trl
_500NoaStatusReasonFtpIncomeStudent.trl
_500NoaStatusReasonFtpIncomeUnearned.trl
_500NoaStatusReasonFtpIncomeWinnings.trl
_500NoaStatusReasonFtpMaritalStatus.trl
_500NoaStatusReasonFtpMedicalCondition.trl
_500NoaStatusReasonFtpPropertyLiquid.trl
_500NoaStatusReasonFtpPropertyVehicle.trl
_500NoaStatusReasonFtpRelationship.trl
_500NoaStatusReasonFtpResidency.trl

5. UPDATE M40-107G TIME LIMIT NOTICE

5.1. Overview

Update M40-107G Time on Aid NOA to update prior benefit amount and current benefit amount to authorized amount.

State Form/NOA: M40-107G

Known County NOA: CW_CH_TL_60_GRANT_REDUCED_EXEMPTS_CS_A414 (Id: 9580)

Current NOA Template: CW_TL_60_NOA_TEMPLATE (Fragment ID = 3044)

Current Program(s): CalWORKs

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: CW 2184 (04/2021)

Languages: English, Spanish

5.2. NOA Reason Verbiage

No verbiage will be updated as part of this SCR.

5.3. NOA Reason Variable Population

Variable Name	Population	Formatting
<PriorMonthCashAid Amount>	Variable should populate with the prior benefit month's authorized amount.	Arial Font 10
<NewCashAidAmount>	Variable should populate with the current benefit month's authorized amount.	Arial Font 10

5.4. NOA Reason Fragment Generation

No Fragment generation will be updated as part of this SCR.

6. AUTOMATED REGRESSION TEST

6.1. Overview

Create new ART scripts to confirm the changes in this SCR.

6.2. Description of Changes

- 1 Create a CW case. Add a Time Limit month and a Non-Compliance. Run EDBC to deny the program. Confirm that the M40-107A does not generate.

Create a CW case. Add a Time Limit month. Run EDBC to activate the program. Add a Non-Compliance. Run EDBC with the RE run reason to discontinue the case. Confirm that the M40-107B does not generate. For each FTP rule, create a CW case with an end dated or Not Applicable record. Run EDBC and confirm that the program is activated.

7. SUPPORTING DOCUMENTS

Note: All NOAs will include the current system version of the NA BACK 9 on the back of the First page.

Number	Functional Area	Description	Attachment
1	NOA		

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-272652

Create County Duplicate Impact List pages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/14/2024	1.0	Initial Design	Trevor Torres
9/10/2024	1.1	Update section 2.5 with details on the County Duplicate List population.	Howard Suksanti
10/3/2024	1.2	Update on section 2.3.2.	Howard Suksanti
11/19/2024	1.3	Update section 2.1 and 2.2 to change and clarify certain values to the page.	Trevor Torres
01/02/2025	1.4	Update to section 2.2 to update the Recovery Accounts to display multiple accounts.	Trevor Torres
1/9/2025	1.4	Removed an example in section 2.3.2.	Howard Suksanti
1/21/2025	1.5	Removed specific Hyperlinks in Section 2.2.3 from the County Duplicate Impact Detail page.	Trevor Torres
1/22/2025	1.6	Updated the Security Updates Section in the Design Document to refer to the Security Matrix for the Group to Role information. Updated mockups to no longer display the hyperlinks on certain sections.	Erika Kusnadi/ Rashmi Holla

Table of Contents

1	Overview	5
1.1	Current Design.....	5
1.2	Requests.....	5
1.3	Overview of Recommendations.....	5
1.4	Assumptions	6
2	Recommendations.....	7
2.1	County Duplicate Impact List	7
2.1.1	Overview	7
2.1.2	County Duplicate Impact List Mockup.....	7
2.1.3	Description of Changes	8
2.1.4	Page Location	10
2.1.5	Security Updates.....	10
2.1.6	Page Mapping.....	11
2.1.7	Accessibility	11
2.1.8	Page Usage/Data Volume Impacts	11
2.2	County Duplicate Impact Detail	12
2.2.1	Overview	12
2.2.2	County Duplicate Impact List Mockup.....	12
2.2.3	Description of Changes	19
2.2.4	Page Location	25
2.2.5	Security Updates.....	26
2.2.6	Page Mapping.....	27
2.2.7	Accessibility	27
2.2.8	Page Usage/Data Volume Impacts	27
2.3	Create new batch to populate County Duplicate Impact Detail.	28
2.3.1	Overview	28
2.3.2	Description of Change.....	28
2.3.3	Execution Frequency.....	29
2.3.4	Key Scheduling Dependencies	29
2.3.5	Counties Impacted	29
2.3.6	Category	29
2.3.7	Data Volume/Performance.....	30

2.3.8	Failure Procedure/Operational Instructions.....	30
2.4	Automated Regression Test.....	30
2.4.1	Overview	30
2.4.2	Description of Changes	30
3	Supporting Documents	31
4	Requirements.....	32
4.1	Project Requirements.....	32

1 OVERVIEW

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

1.1 Current Design

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

1.2 Requests

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

1.3 Overview of Recommendations

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

1.4 Assumptions

1. Existing functionalities will remain unchanged unless called out as part of this SCR.
2. Existing records that are currently marked as a “duplicate” will not be included in the “County Duplicate Impact List” page upon release. Only the records that have been marked as duplicate after these pages have been implemented will be added to the “County Duplicate Impact List” page.
3. The EBT section on the County Duplicate Impact Detail page will not display any EBT card that has not yet been added to CalSAWS. The worker has the option to add the cards in CalSAWS through the EBT Account page.
4. The Recovery Account section on the County Duplicate Impact Detail page will display only the Active Recovery account.
5. Hyperlinks for the specific section on the County Duplicate Impact Detail page will be added as part of CA-286925 SCR.

2 RECOMMENDATIONS

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

2.1 County Duplicate Impact List

2.1.1 Overview

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

2.1.2 County Duplicate Impact List Mockup

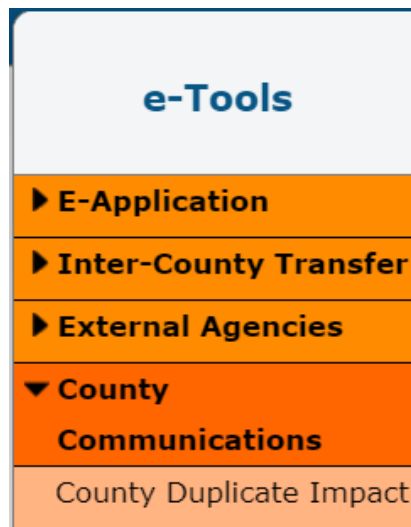


Figure 2.1.2.1 – County Communications E-Tools New Task Mockup

County Duplicate Impact List

The mockup shows a search page for the "County Duplicate Impact List". At the top right is a "Search" button. Below it is a search form with the following fields:

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

At the bottom right, there is a "Results per Page: 100" dropdown menu and a "Search" button. At the bottom left, there is a status bar that says "This Type 1 page took 0.33 seconds to load."

Figure 2.1.2.2 – County Duplicate Impact List page before Search Mockup

County Duplicate Impact List

▼ Refine Your Search

Search

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

Results per Page: 100 **Search**

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

This Type 1 page took 0.33 seconds to load.

Figure 2.1.2.3 – County Duplicate Impact List page after Search Mockup

2.1.3 Description of Changes

1. Create a new page called “County Duplicate Impact List”.
 - a. When a person is marked as a duplicate from the “Duplicate Person List” page, it will be recorded as an instance on this page and display the appropriate information after an overnight Batch Job (see section 2.3 for more information), as shown in Figure 2.1.2.3.
 - i. The records being displayed will only be the records for impacted cases within the user's county.
 - ii. Persons with multiple cases will have multiple instances displaying.
 - b. The “Last Name”, “First Name”, “Middle Name/Initial”, “Case Number”, “CIN”, and “Date of Birth” search fields will search for records in the “County Duplicate Impact List” page with the same field name values in them and display in the “Search Results Summary” in their appropriate fields after selecting the “Search” button.

- c. The "Status" search field will search for records in the "County Duplicate Impact List" page with the same values as the selected value from the dropdown (except for "Blank") in them and display in the "Search Results Summary" in the "Status" field after selecting the "Search" buttons.
 - i. The "Status" dropdown field will display the following options:
 - 1. "Blank"
 - 2. New
 - 3. In-Process
 - 4. Completed
 - ii. The page will default the "Status" field to "New" when accessing the page, as shown in Figure 2.1.2.2, but can be manually changed to any of the above options.
- d. The "Staff ID" search option will find instances that were made by a certain staff member, however there will not be a "Staff ID" to display in the results.
- e. The "To:" field will auto populate with the day the user accesses the page and the "From:" field will auto populate the date 60 days before the "From:" field.
 - i. These fields will be required.
 - ii. Display a validation message when the user clicks on the "Search" button and if the range goes beyond the 60 days.
 - 1. The validation will display the following message: "To – Maximum range is 60 days. Please adjust the range."
 - iii. Display a validation message when the user clicks on the "Search" button when either of the text-area fields have 0 characters.
 - 1. The validation will display the following message if the "To:" field is empty: "To – Field is required. Please enter a value."
 - 2. The validation will display the following message if the "From:" field is empty: "From – Field is required. Please enter a value."
 - iv. Display a validation message when the user clicks on the "Search" button when the date in "From:" is greater than the date in "To:".
 - 1. The validation will display the following message: "From – Date is greater than date in "To". Please enter a date that is before the date in "To".
- f. The "Search" buttons when selected will find records in the "County Duplicate Impact List" page that match with the inputted search fields.
- g. The default sorting will be based on the "Created Date" field, with the most recent date displaying first and follow

chronologically. Additional cases/instances tied to that person will also be sorted based on the most recent date.

- h. Using the hyperlink on the name of the duplicate person will take the user to the 'View' mode of the "County Duplicate Impact Detail" page of that duplicate person's record.
- i. Using the "Edit" button next to a duplicate person's record will take the user to the 'Edit' mode of the "County Duplicate Impact Detail" page of that duplicate person's record.
 - i. The "Edit" button will only display if the user has the new Security Right "CountyDuplicateImpactDetailEdit".
- j. This page will be located in the Global Toolbar "e-Tools" under a new Task Header labeled "County Communications" when a new task labeled "County Duplicate Impact" will display, as shown in Figure 2.1.2.1.
 - i. The "County Duplicate Impact" Task will not display if the user does not have the 'CountyDuplicateImpactView' Security Right. See Section 2.1.5 for more information.

2.1.4 Page Location

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

2.1.5 Security Updates

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

1. Security Rights

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

Security Right	Right Description	Right to Group Mapping
	of impacted duplicate person(s) records from the list page.	Impact Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Duplicate Impact View	View county duplicate impact person(s) list and detail.	Please refer to the Security Matrix for details.
County Duplicate Impact Detail Edit	Edit county duplicate impact person(s) detail status and make comments.	Please refer to the Security Matrix for details

2.1.6 Page Mapping

Create the Page Mapping for the new page.

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 County Duplicate Impact Detail

2.2.1 Overview

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

2.2.2 County Duplicate Impact List Mockup

County Duplicate Impact Detail

*- Indicates required fields

Edit Close

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

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

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

Add Person

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

Associated Cases:	
<u>Kyle Johnson</u>	
Case Number	County
1111111	19
5555555	19
Reviewed: No	

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

EBT					Reviewed: Yes	
Account Number:	Primary Card Holder:	Secondary Card Holder:	Current Address:	EBT Status:	Card Status:	
1901B0TM234	VESPER, Marian 43F		11 OLD POWDER HOUSE	Active	Issued	

Recovery Account			Reviewed: Yes	
Recovery Account Number:	Program Type:	Discovery Month:		
815208268	CalWORKs	08/08/2024		
Recovery Account Number:	Program Type:	Discovery Month:		
815208461	CalWORKs	08/08/2024		

Time Limit Summary Links		Reviewed: No	
Duplicate Person Link			
VESPER, Marian 43F(dup)			

IPVs			Reviewed: Yes	
Name:	Court Ordered Date:	Begin Date:		
VESPER, Marian 43F(dup)		10/22/1999		

▼ Absent/Unmarried Parent(s)				Reviewed: Yes	
Name:	SSN:	DOB:	Address:		
BOLLETTE, AGRIPINA 42M(dup)	503-01-4235	04/04/1982	2424 CADWALLADER SONK RD		
Name:	SSN:	DOB:	Address:		
VESPER, Marian 43F(dup)	344-46-3925	11/11/1981	11 OLD POWDER HOUSE		

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

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

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

	Case Number	County
Add Person	9999999	19
	8888888	18

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

County Duplicate Impact Detail

*- Indicates required fields

Save

Cancel

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

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

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

Add Person

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

EBT					Reviewed: <input type="checkbox"/>
Account Number:	Primary Card Holder:	Secondary Card Holder:	Current Address:	EBT Status:	Card Status:
1901B0TM234	VESPER, Marian 43F		11 OLD POWDER HOUSE	Active	Issued

Recovery Account			Reviewed: <input type="checkbox"/>
Recovery Account Number:	Program Type:	Discovery Month:	
815208268	CalWORKs	08/08/2024	
Recovery Account Number:	Program Type:	Discovery Month:	
815208461	CalWORKs	08/08/2024	

Time Limit Summary Links	Reviewed: <input type="checkbox"/>
Duplicate Person Link	
VESPER, Marian 43F(dup)	

IPVs			Reviewed: <input type="checkbox"/>
Name:	Court Ordered Date:	Begin Date:	
VESPER, Marian 43F(dup)		10/22/1999	

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

▼ Absent/Unmarried Parent(s) Reviewed: ☐

Name:	SSN:	DOB:	Address:
BOLLETTE, AGRIPINA 42M(dup)	503-01-4235	04/04/1982	2424 CADWALLADER SONK RD
Name:	SSN:	DOB:	Address:
VESPER, Marian 43F(dup)	344-46-3925	11/11/1981	11 OLD POWDER HOUSE

Self-Service Portal Reviewed: 

Relinking Reminder

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

▼ **Change History** Reviewed: ☒

Staff Name:	Staff ID:	Date Time Stamped:	Status Change:
Rashmi Holla	1411300	01/22/2025 00:14:48 AM	In-Process
Comments:			
to IP			

Comments ✱

--

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

▼ Absent/Unmarried Parent(s)			Reviewed: Yes
Name:	SSN:	DOB:	Address:
BOLLETTE, AGRIPINA 42M(dup)	503-01-4235	04/04/1982	2424 CADWALLADER SONK RD
Name:	SSN:	DOB:	Address:
VESPER, Marian 43F(dup)	344-46-3925	11/11/1981	11 OLD POWDER HOUSE

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

▼ Change History			Reviewed: Yes
Staff Name:	Staff ID:	Date Time Stamped:	Status Change:
Rashmi Holla	1411300	01/23/2025 09:42:07 AM	New
Comments: Status changed to Complete			

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

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

18

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

Recovery Account		Reviewed: <input checked="" type="checkbox"/>
Recovery Account Number:	Program Type:	Discovery Month:
815208268	CalWORKs	08/08/2024
Recovery Account Number:	Program Type:	Discovery Month:
815208461	CalWORKs	08/08/2024

Figure 2.2.2.11 – County Duplicate Impact Detail View Mode Multiple Recovery Accounts Mockup

2.2.3 Description of Changes

1. Create a new page called "County Duplicate Impact Detail".
 - a. This page in View mode will display detailed information about the record.
 - i. The information will only display the details obtained from the overnight Batch Job (See section 2.3 for more information).
 1. When in Edit mode, the information displaying will not be updated or editable for the specific instance, with the exception of the "Status" field in the "General Duplicate Information" section.
 - ii. Each of the following sections will have "Reviewed:" to the right of their labels and will either display "Yes" or "No" depending on the checkboxes in 'Edit' mode.
 1. In 'View' mode, next to "Reviewed:" will display 'Yes' if the checkbox has been checked and saved when in 'Edit' mode, as shown in Figure 2.2.2.10.
 2. In 'View' mode, next to "Reviewed:" will display 'No' if the checkbox is not checked when in 'Edit' mode and saved, as shown in Figure 2.2.2.1 and Figure 2.2.2.3
 - iii. The "General Duplicate Information" section will display demographic information, record status and created date, as shown in Figure 2.2.2.1.
 1. When a record is created for the "County Duplicate Impact Detail" page, the "First Name", "Middle Name", "Last Name", "Case Number", "CIN", and "Date of Birth" result fields will be populated from the duplicate record information from the "Individual Demographics Detail" page.
 - a. The "Case Number" field will only display one Case Number, which is based on the

record selected from the "County Duplicate Impact List" page with the same Case Number.

- b. The "Case Number" field will have a hyperlink that will take the user to the 'Case Summary' page of the duplicate person in the "Case Info" Global section.
2. The "Status" field will display the status of the record that can be adjusted in the 'Edit' mode of this page.
 - a. The following options will display in the field:
 - i. New
 - ii. In-Process
 - iii. Completed
 - b. Newly created records on the "County Impact Duplicate Detail" page will have the "Status" field default to "New".
 - c. Records with the 'Status' of "Completed" will still be able to be editable.
 3. The "Created Date" field will display the date that this record was marked as a duplicate and added to the "County Impact Duplicate List" page.
 4. The name displayed in the "Associated Cases" field will be the name of the duplicate person in the format of First Name and Last Name.
 - a. The name displayed in the "Associated Cases" field will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.2.2.2.

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

- iv. The "Program(s) as of Created Date" section, as shown in Figure 2.2.2.1, will display:
 1. The programs associated with the duplicate person in the "Associated Program(s)" field.
 2. Their status is related to the program(s) in the "Person Status" field.
 3. The role they have for that program in the "Role" field.
 4. Make the "Program(s) as of Created Date" section collapsible.
 - a. The section will be collapsed by default.

5. This section is dynamic based on if the Duplicate Person has programs associated to them.
- v. The "Golden Record" section will display the person record that is marked as the "Golden Record" for the duplicate person record the page is displaying, as shown in Figure 2.2.2.1.
 1. The fields will be populated from the "Individual Demographics Detail" page of the record that is the "Golden Record" of the duplicate person.
 2. The "Add Person" button will allow the user to add the Golden Record person that is being displayed in the "Golden Record" section as a Case Person to the case number of the Duplicate person that is being viewed.
 - a. If the Golden Record person is already a Case Person within the case of the Duplicate person, then the button will dynamically disappear.
 - b. Users will only be able to see and use the "Add Person" button if they have the "CountyDuplicateImpactDetailEdit" Security Right assigned to them.
 3. The name displayed in the "Name" field of the "Golden Record" section will be underlined and will have a tooltip that will display every "Case Number" the person record is associated to and the "County" number that the Case Number is connected to, as shown in Figure 2.2.2.4.
- vi. The "EBT" section will display the information of the duplicate person on their current account with EBT.
 1. This section will pull the data elements from the 'EBT Account Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Account Number
 - b. Primary Card Holder
 - c. Secondary Card Holder
 - d. Current Address
 - e. EBT Status
 - f. Card Status
 2. The "Account Number" field will have a hyperlink that will take the user to the 'EBT Account Detail' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s) to view.
 3. This section is dynamic based on if the Duplicate Person is associated to an active EBT Account.

- vii. The "Recovery Account" section will display the information of the duplicate person if the recovery account has not been resolved as of being marked as a Duplicate.
 - 1. This Section will pull the data elements from the 'Overissuance Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Recovery Account Number
 - b. Program Type
 - c. Discovery Date
 - 2. The "Recovery Account Number" field will have a hyperlink that will take the user to the 'Recovery Account Detail' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 3. This section is dynamic based on if the Duplicate Person is associated to an unresolved Recovery Account when being marked as a Duplicate.
 - a. An unresolved Recovery Account is classified by having any of the following Statuses:
 - i. Suspended
 - ii. Active
 - iii. Pending
 - iv. New
 - v. Pending Approval
 - vi. Pending Agreement
 - 4. If the duplicate person has multiple Recovery Accounts associated with their "PERS_ID", the section will display those Recovery Accounts as separate instances, as shown in Figure 2.2.2.11.
- viii. The "Time Limit Summary Links" section will display the "Duplicate Person Link" field shown in Figure 2.2.2.3.
 - 1. The hyperlink under the "Duplicate Person Link" field will take the user to the 'Time Limit Summary' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 - 2. This section is dynamic based on if the Duplicate Person is associated to a Time Limits Account.
- ix. The "IPVs" section will display the information of the duplicate person if there is a Court Order that has not been resolved as of being marked as a Duplicate.

1. This Section will pull the data elements from the 'Permanency Plan Court Order Detail' page to the following fields shown in Figure 2.2.2.3:
 - a. Name
 - b. Court Ordered Date
 - c. Begin Date
2. The field "Name" will have a hyperlink that will take the user to the 'Permanency Plan Court Order List' page of the duplicate person if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
- x. The "Absent/Unmarried Parent(s)" section will display records from the "Absent/Unmarried Parent List", which can include the primary duplicate person.
 1. This Section will pull the data elements from the 'Support Questionnaire' page to the following fields for each record shown in Figure 2.2.2.3:
 - a. Name
 - b. SSN
 - c. DOB (Date of Birth)
 - d. Address
 2. The "Name" field will have a hyperlink will take the user to the 'Support Questionnaire' page of the person record that is being selected if the user has the appropriate Security Right(s) to view that page.
 - a. The hyperlink will appear as normal text if the user does not have the appropriate Security Right(s).
 3. Make the "Absent/Unmarried Parent(s)" section collapsible.
 - a. The section will be collapsed by default.
 4. This section is dynamic based on if the Duplicate Person is associated to an absent/unmarried parent when being marked as a Duplicate.
- xi. The "Self-Service Portal" section will display a reminder message to the worker, shown in Figure 2.2.2.3.
 1. The section will display the message: "Person was identified as a "Duplicate" and may no longer have access to their Case Details via the Self-Service Portal. Make sure the Golden Record is relinked to their Self-Service Portal Account."
 2. This section is dynamic based on if the Duplicate Person has a Self-Service Portal linked account.

3. This section will still display even after the Golden Record has been relinked to their Self-Service Portal Account.
- xii. Add a "Change History" section, that records information on the user who made the change, what time it was changed to, and comments on why the "Status" field of the record was changed, as shown in Figure 2.2.2.8 and Figure 2.2.2.9.
 1. The "Change History:" record will only be generated when a user has changed the "Status" field to a different value and saves from 'Edit' mode.
 2. The "Staff Name:" and "Staff ID:" fields will pull the name and the staff ID of the worker from the staff that made the change.
 - a. The Staff ID will link to the worker's Worker Detail page.
 3. The "Date Time Stamped:" field will generate the date and time when a user makes a change in 'Edit' mode and saved on the "County Duplicate Impact Detail" page.
 - a. These instances of "History Details" will be sorted descending based off the most recent change.
 4. The "Status Change:" field will display the new value of the "Status" field.
 5. The "Comments:" field in the View mode will display what was written in the "Comments" section from the Edit mode of the "County Impact Duplicate Detail" page.
 6. Make the "Change History" section collapsible.
 - a. The section will be collapsed by default.
- xiii. The "Edit" Button will allow the user to go into the 'Edit' mode of the Impact page.
 1. If the user does not have the "CountyDuplicateImpactDetailEdit" Security Right, they will not see the 'Edit' button or be able to access the 'Edit' mode for the page. See Section 2.2.5 for more information.
- xiv. The "Close" Button will take the user to 'Impact List' page.
- b. The 'Edit' mode of this page is accessed through the "Edit" buttons on the "County Duplicate Impact List" and "County Duplicate Impact Detail" pages.
 - i. The "General Duplication Information" section will display the same information as the 'View' mode except for the "Status" field, where it will be a required dropdown field.
 1. The dropdown will display the following options:

- a. New
 - b. In-Process
 - c. Completed
- ii. Add "Comments" section with a text-area field to the Edit mode that will require users to provide more information as to the decision to adjust the information.
 - 1. If the "Status" value is changed to a different value from its previous value, this field will be required.
 - 2. This field will dynamically hide by default and will dynamically appear when the "Status" dropdown has been changed to a different value than the old value.
 - 3. Display a validation message when the user clicks on the "Save" button when the text-area field has more than 2000 characters.
 - a. The validation will display the following message: "Comments – [Text2000] Value is too long [Max. length: 2000.0]".
 - 4. Display a validation message when the user clicks on the "Save" button when the text-area field has 0 characters.
 - a. The validation will display the following message: "Comments – Field is required. Please enter a value.".
- iii. Additional sections will display the same information as the 'View' mode with no editable options to the fields.
 - 1. Checkboxes will appear to the right side of "Reviewed:" for each section (besides the "Comments" text-area field") when in 'Edit' mode, with the words "Reviewed:" to indicate users if a section has been looked at by a user, as shown in Figure 2.2.2.5, Figure 2.2.2.6, and Figure 2.2.2.7.
 - a. These checkboxes do not have any impact on the other fields within each of the sections. Its use is only for a visual reference to the users.
- iv. The "Save" Button will save the changes made in 'Edit' mode to 'View' mode and check for validations, if applicable.
- v. The "Cancel" Button will take the user back to the 'View' mode of the page and will not save any changes made in 'Edit' mode.

2.2.4 Page Location

- **Global:** Case Info

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

2.2.5 Security Updates

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

1. Security Rights

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

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Duplicate Impact View	View county duplicate impact person(s) list and detail.	Please refer to the Security Matrix for details
County Duplicate Impact Detail Edit	Edit county duplicate impact person(s) detail status and make comments.	Please refer to the Security Matrix for details

2.2.6 Page Mapping

Create the Page Mapping for the new page.

2.2.7 Accessibility

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

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Create new batch to populate County Duplicate Impact Detail.

2.3.1 Overview

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

2.3.2 Description of Change

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

County Duplicate List record:

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

County Duplicate Detail record:

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

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

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

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

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

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

Example 3, Person A is marked as a duplicate with Person B (Golden record) at 10am on 5/14/2024. Person A is associated with County 18 case and County 19 case. Person is Out of Home on County 18 case. There will be 2 records: 1 for County 18 and 1 for County 19.

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

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

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

2.3.3 Execution Frequency

Daily (Mon-Sat) except Holidays.

2.3.4 Key Scheduling Dependencies

N/A.

2.3.5 Counties Impacted

All counties.

2.3.6 Category

Core.

2.3.7 Data Volume/Performance

N/A

2.3.8 Failure Procedure/Operational Instructions

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

2.4 Automated Regression Test

2.4.1 Overview

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

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

2.4.2 Description of Changes

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

3 SUPPORTING DOCUMENTS

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

4 REQUIREMENTS

4.1 Project Requirements

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

CalsAWS

California Statewide Automated Welfare System

Design Document

CA-272696

Update the ICT termination batch job to terminate when
ICT approved.

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Supritha Sundaram
	Reviewed By	Balakumar Murthy, Ken Ford, John Pratt, Teresa Magnuson

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/05/2024	1.0	Initial Draft	Supritha Sundaram
8/08/2024	2.0	Update with EW05	Supritha Sundaram
9/16/2024	2.1	Add assumptions	Supritha Sundaram
10/1/2024	2.2	Clarified descriptions from Teresa's comments	Supritha Sundaram
12/9/2024	3.0	Added BSCR requirement	Supritha Sundaram
1/17/2024	4.0	Content Revision to move date	Supritha Sundaram

Table of Contents

Overview.....	4
1.1. Current Design	4
1.2. Requests.....	4
1.3. Overview of Recommendations	4
Assumptions.....	5
RECOMMENDATIONS	5
2.1 Update EictTransactionSweep (PB00E151).	Error! Bookmark not defined.
2.1.1 Overview.....	Error! Bookmark not defined.
2.1.2 Description of Change	Error! Bookmark not defined.
2.1.3 Execution Frequency	Error! Bookmark not defined.
2.1.4 Key Scheduling Dependencies.....	Error! Bookmark not defined.
2.1.5 Counties Impacted	Error! Bookmark not defined.
2.1.6 Category	Error! Bookmark not defined.
2.1.7 Data Volume/Performance	Error! Bookmark not defined.
2.1.8 Failure Procedure/Operational Instructions.....	Error! Bookmark not defined.
3.1 Add BSCR to ensure sweeps run before BatchEdbc.	5
3.1.1 Overview.....	5
3.1.2 Description of Change	5
3.1.3 Execution Frequency	5
3.1.4 Key Scheduling Dependencies.....	5
3.1.5 Counties Impacted	5
3.1.6 Category	5
3.1.7 Data Volume/Performance	5
3.1.8 Failure Procedure/Operational Instructions.....	5
3.2 Suppress EW05	6
3.2.1 Overview.....	6
3.2.2 Description of Change	6
3.2.3 Execution Frequency	6
3.2.4 Key Scheduling Dependencies.....	6
3.2.5 Counties Impacted	6
3.2.6 Category	6
3.2.7 Data Volume/Performance	6

3.2.8 Failure Procedure/Operational Instructions	6
3.2.9 Assumptions.....	7
APPENDIX	7

OVERVIEW

The purpose of the SCR CA-272696 is to prevent potential overlap of benefits during ICT transfer by updating the ICT termination batch jobs to terminate eligibility in sending county at the same time the approval disposition is received

1.1. Current Design

The ICT batch jobs do not run the termination until the following month, sometimes delaying the termination transaction in MEDS and preventing the receiving county's aid from picking up. This is resulting in the need to call/contact sending county for every ICT to ask them to terminate prior to our approval.

1.2. Requests

With this SCR, we have to run EDBC effective month of approval in the receiving county through come up month and ensure discontinuance in sending county occurs before or same time as approval in receiving county.

1.3. Overview of Recommendations

Update EictTransactionSweep and EictCaseFsDiscSweep batch jobs to terminate eligibility in sending county at time of approval disposition received.

CalSAWS batch job looks for these cases to terminate nightly, however the batch job does not terminate the program, instead the batch job flags the case to terminate on effective date.

Due to the batch job not running the termination until the following month, the termination transaction is not sending to MEDS timely which is preventing the receiving county's aid from picking up. This is resulting in the need to call/contact sending county for every ICT to ask them to terminate prior to our approval.

The CalSAWS batch job should look for cases nightly and terminate them the same day with the termination effective for the end of the month prior to the receiving

county's approval date.

Assumptions

County should not run retro EDBC for past dates

RECOMMENDATIONS

2.1 Add BSCR to ensure sweeps run before BatchEdbc.

2.1.1 Overview

Add BSCR to ensure our two sweeps run before BatchEdbc.

2.1.2 Description of Change

Add BSCR to ensure PB00E151 run before BatchEdbc to ensure the approval runs don't run out of order

2.1.3 Execution Frequency

Daily

2.1.4 Key Scheduling Dependencies

PB00E151 run before BatchEdbc

2.1.5 Counties Impacted

All

2.1.6 Category

Core-prime

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

The existing error handling/operational procedure will be followed.

2.2 Suppress EW05

2.2.1 Overview

Suppress EW05 transaction .

2.2.2 Description of Change

Sending EW05 to MEDS from Calsaws will shut down the county's eligibility and post the receiving County's eligibility when the sending County's eligibility is still active in MEDS. Since this SCR will handle the first action, EW05 will no longer be necessary to be sent. Suppress all EW05 transactions

2.2.3 Execution Frequency

MEDS interface jobs Daily

2.2.4 Key Scheduling Dependencies

Same as before

2.2.5 Counties Impacted

All

2.2.6 Category

Core-prime

2.2.7 Data Volume/Performance

N/A

2.2.8 Failure Procedure/Operational Instructions

The existing error handling/operational procedure will be followed.

2.2.9 Assumptions

When the EW40 fails due to discrepancies such as an SSN mismatch, alerts will be generated. They county should manually submit the MEDS Online transactions.

APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-278393

Add CW 2200 in Threshold Languages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Meghana R Chander
	Reviewed By	Nagesha S

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/08/2024	1.0	Initial Draft	Meghana R Chander
01/09/2025	1.1	To remove Hindi and Tagalog from recommendation	Meghana R Chander

Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	4
2	Recommendations.....	4
2.1	Add CW2200 (5/23) in threshold languages to CalSAWS.....	4
2.1.1	Overview	4
2.1.2	Form Verbiage	5
2.1.3	Form Variable Population	5
2.1.4	Form Generation Conditions	5
3	Supporting Documents	7
4	Requirements.....	7
4.1	Project Requirements.....	7

1 OVERVIEW

The purpose of this change is to add additional threshold languages to CW 2200 form.

1.1 Current Design

Currently CW 2200 (5/23) – “Request For Verification” form exists in English, Spanish, Armenian, Chinese and Vietnamese.

1.2 Requests

Add the following threshold languages to CW 2200 (5/23).

Languages Include: Arabic, Cambodian, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai and Ukrainian.

1.3 Overview of Recommendations

Add the following threshold languages to CW 2200 (5/23).

Languages Include: Arabic, Cambodian, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai and Ukrainian.

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for the English form.
2. There are no changes to the generation logic of these forms. All triggers for the new threshold forms will be the same as the existing English form.
3. The Hindi and Tagalog forms will be implemented as part of CA-286571.
4. All fields (blank or prepopulated) will be editable.
5. Supporting Documents section references attachments found on Jira.

2 RECOMMENDATIONS

2.1 Add CW2200 (5/23) in threshold languages to CalSAWS

2.1.1 Overview

This effort will add additional threshold languages to the CW2200 (5/23) in CalSAWS.

State Form: CW 2200 (5/23)

Programs: GROW, CalWORKs, RCA, CalFresh, Medi-Cal, CAPI, General Assistance/General Relief, Cal-Learn, Welfare to Work, REP

Forms Category: Forms

Template Repository Visibility: All Counties

Form Title (Document List Page Displayed Name): Request For Verification

Template Description: This form is a request for the Verification of outstanding documents to be brought in.

Existing Languages: English, Spanish, Armenian, Chinese and Vietnamese.

Threshold Languages: Arabic, Cambodian, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai and Ukrainian

2.1.2 Form Verbiage

Create CW 2200 XDP

New XDPs will be created for CW 2200 (5/23) in threshold languages.

Threshold Languages: Arabic, Cambodian, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai and Ukrainian.

Add BRM header to the back of the coversheet.

The first page will be a coversheet with the standard header, second page will be BRM page, third page onwards will be the actual CW 2200 form.

Form Header: CalSAWS Standard Header (HEADER_1_EN)

Include NA Back 9: No

Imaging Form Name: Request For Verification

Imaging Document Type: Verification Requests

Form Mockups/Examples: See supporting document #1

2.1.3 Form Variable Population

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

Note: PROOF_OF is a dropdown field. The threshold language forms must have the values of the dropdown populated with the values translated from English drop down values.

2.1.4 Form Generation Conditions

CW 2200 (5/23) form can either be generated through batch or Template repository or online page (Eligibility → Customer Information → Verification list page).

Update batch job (PB00R1921) to generate the CW 2200 (5/23) in all available threshold languages.

Technical Note: Update CT942_134

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

Form Print Options and Mailing Requirements

The following are the print and mailing requirements for CW 2200 (5/23)

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 for CW 2200
Mail-To (Recipient)	Applicant selected on the document parameters page when generated through Template Repository and Primary applicant when generated through Batch.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	County BRM address which generated the form
Outgoing Envelope Type	Standard
Return Envelope Type	BRM
Special Paper Stock	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

Additional Options:

Requirement	Option for CW 2200 Form
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms	CW 2200 (5/23)	CW_2200_Arabic.pdf CW_2200_Cambodian.pdf CW_2200_Farsi.pdf CW_2200_Hindi.pdf CW_2200_Hmong.pdf CW_2200_Japanese.pdf CW_2200_Korean.pdf CW_2200_Lao.pdf CW_2200_Mien.pdf CW_2200_Punjabi.pdf CW_2200_Russian.pdf CW_2200_Tagalog.pdf CW_2200_Thai.pdf CW_2200_Ukrainian.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;	CW 2200 (5/23) is being added in additional threshold languages to CalSAWS.

	<p>k. Court-mandated notices, including Balderas notices;</p> <p>l. SSIAP appointment notices;</p> <p>m. Withdrawal forms;</p> <p>n. COLA notices;</p> <p>o. Time limit notices;</p> <p>p. Transitioning of aid notices;</p> <p>q. Interface triggered forms and notices (e.g., IFDS, IEVS);</p> <p>r. Non-compliance and sanction notices;</p> <p>s. Benefit issuance and benefit recovery forms and notices, including reminder notices;</p> <p>t. Corrective NOAs on State Fair Hearing decisions;</p> <p>u. CSC paper ID cards with LRS-generated access information; and</p> <p>v. CSC PIN notices.</p>	
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