

CalSAWS

California Statewide Automated Welfare System



CA-237792

Alternate Formats Request Process for Visually Impaired Applicants and Beneficiaries – Phase 1

DOCUMENT APPROVAL HISTORY

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DATE	VERSION	REVISION DESCRIPTION	AUTHOR
11/04/2024	1.0	Initial Draft	Lalitha Valamarthi
02/05/2025	2.0	<ul style="list-style-type: none"> Removing EW25 and EW05 from MEDS impacted transactions list Added new assumption on portal related changes Remove the '.' From Auth. Rep or Auth Rep. from the Online sections including updating all appropriate mockup to match. Added a Note that we are changing the existing logic on how the Name will be listed on the Name column which is by First Name in Alphabetical order) Remove the Medi-Cal program requirement on when the Non-Case Auth Rep record can't be removed for the validation to display 	<p>Yuga Teja</p> <p>Gillian Noelle Bendicio</p> <p>Erika Kusnadi-Cerezo</p>
02/10/2025	2.1	<ul style="list-style-type: none"> Update the page mapping to incorporate the changes introduced in Section 2.11 and modify the figure name in Sections 2.11.2-2 to "Reprinted Centrally." In Section 2.14.2, change the format type to "Alternative." 	Lalitha Valamarthi

Table of Contents

1	OVERVIEW	3
1.1	Current Design.....	3
1.2	Requests.....	3
1.3	Overview of Recommendations.....	3
1.4	Assumptions.....	4
2	RECOMMENDATIONS	5
2.1	Special Circumstances List.....	5
2.2	Special Circumstances Detail.....	7
2.3	Case Summary	12
2.4	Utilities Navigation.....	13
2.5	Authorized Representative List.....	15
2.6	Add Column to Generate Doc Table (Technical Changes)	16
2.7	Add Column to Print File Table (Technical Changes).....	16
2.8	Create a new Category to store Format types (Technical Changes)	17
2.9	Render the "View" records – Forms and NOAs	17
2.10	Add PDF bookmark metadata string to the "View" records (Technical Changes)	18
2.11	Document Detail Page changes	19
2.12	Create the Print File Batch Job for Alternative Formats – Forms	21
2.13	Create the Print File Batch Job for Alternative Formats - NOAs.....	23
2.14	Create the Bundling Batch Jobs - 'Alternative' Bundle.....	25
2.15	Create the Bundling Batch Jobs - 'Companion' Bundle	28
2.16	Self-Service Portal - Support Request API.....	30
2.17	Batch & Interfaces -Create and Send new data element 0116 in MEDS transaction.....	31
2.18	Support Request API – Self Service Portal: Alternate Format Request Automated Action	32
2.19	Generated Document: Mailed With Alternate Format Automated Action	36
2.20	Generated Document: Mailed With Alternate Format Automated Action Batch Job.....	39
2.21	Automated Regression Test	40
3	SUPPORTING DOCUMENTS	41

CA-237792 – Alternate Formats Request Process for Visually Impaired Applicants and Beneficiaries

1 OVERVIEW

The Department of HealthCare Services (DHCS) introduced Medi-Cal Eligibility Division Information Letter (MEDIL) 21-31 Alternate Formats Request Process for Visually Impaired Applicants and Beneficiaries, which instructs counties on how to provide effective communication with visually impaired Medi-Cal applicants and beneficiaries through alternative formats. The purpose of this document is to satisfy the functional specifications required for updating the Alternate Formats Request process, which is designed to help blind or visually impaired Medi-Cal applicants and beneficiaries receive forms and notices in their preferred alternate formats.

1.1 Current Design

CalSAWS does not have a way to capture alternative communication formats and also send forms and notices in alternate formats for visually impaired applicants and beneficiaries.

1.2 Requests

1. Add an Alternate Communication Format option to CalSAWS to capture alternate communication preferences and the correspondence (Form/NOA) will be sent in the requested alternate format.
2. Update the system to send separate Print Bundles for Alternate Formats and a separate companion bundle for the regular format to Print Center Vendor.
3. Add a PDF bookmark metadata string to the CalSAWS "View" record for forms and NOAs generated for threshold copies.

1.3 Overview of Recommendations

1. Updating CalSAWS to store the alternate format for all participant in the case and for authorized representatives.
2. Update the system to send separate Print Bundles to Print Center Vendor for Alternate Formats.
3. Add a PDF bookmark metadata string to the CalSAWS "View" record for forms and NOAs generated for threshold copies.
4. Add a new field to display the alternative format on the "Document detail Page".
5. Create new central print batch jobs to process the cases with alternative formats.
6. Create the print file transfer batch processes for the Alternate Formats.

7. Update the Special Circumstances page so Special Circumstances Record can be created for Non-Case Person Authorized Representative.
8. Update the Authorized Representative pages to not allow removal or updates to the Non-Case Person Representative for Medi-Cal program record when there's a Special Circumstances record for that Non-Case Person Authorized Representative.

1.4 Assumptions

1. This is a two phased approach with phase 1 going in 25.03 with SCR CA-237792 and phase 2 going in 25.05 with SCR CA-286608. Even though the changes will be available in the system, the actual mailing of the Alternative Format correspondence will be sent by central print starting 25.05.
2. Special Circumstances record can be created (including requesting an alternate format of communication for Medi-Cal Correspondence) for Non-Case Person Authorized Representative only and not for Organization/Resources (Special Circumstances record can already be created for Case Person Authorized Representative).
3. Special Circumstances record for Non-Case Person Authorized Representative will not apply to Reception log pages as Authorized Representative is not an option for Reception Log.
4. Updates to include a Mail Date provided by Print Center Vendor for Correspondence will be handled by SCR CA-274050.
5. Updates to the iText software will be addressed in SCR CA-281074.
6. If the form/NOA is generated for a case where a medical program doesn't exist, the form will not be sent in the alternative format, even if the participant has requested it.
7. An external vendor will be able to convert forms/NOAs generated in all languages within the CalSAWS system to the requested alternative formats in the same language, except for Braille. The vendor can only convert the form/NOA into Braille if the original form is generated in either English or Spanish. If the form/NOA is generated in a language other than English or Spanish, and the alternative format requested is Braille, the vendor will generate the Braille format in English.
8. The Enclosures, GEN 1365 and Intelligent Mail barcodes for Business Reply Mail will not be included in the alternative format bundle, but they will be present in the companion bundle.
9. All existing functionalities will remain unchanged unless called out as part of this SCR.
10. For primary applicants and Authorized Representatives with e-notifications enabled and an alternative format requested, the system will e-notify the participant and also mail the documents in the requested alternate format.
11. Self-Service Portal (SSP) changes are documented in CSPM-74963 and will be deployed to production as part of the BenefitsCal March 2025 release.

2 RECOMMENDATIONS

2.1 Special Circumstances List

2.1.1 Overview

The Special Circumstances List page displays a list of Special Circumstances Detail records for people (Case Person) associated to a case. This SCR will allow Special Circumstances record to be created for Non-Case Person Authorized Representative for that specific case as well.

2.1.2 Special Circumstances List Mockup

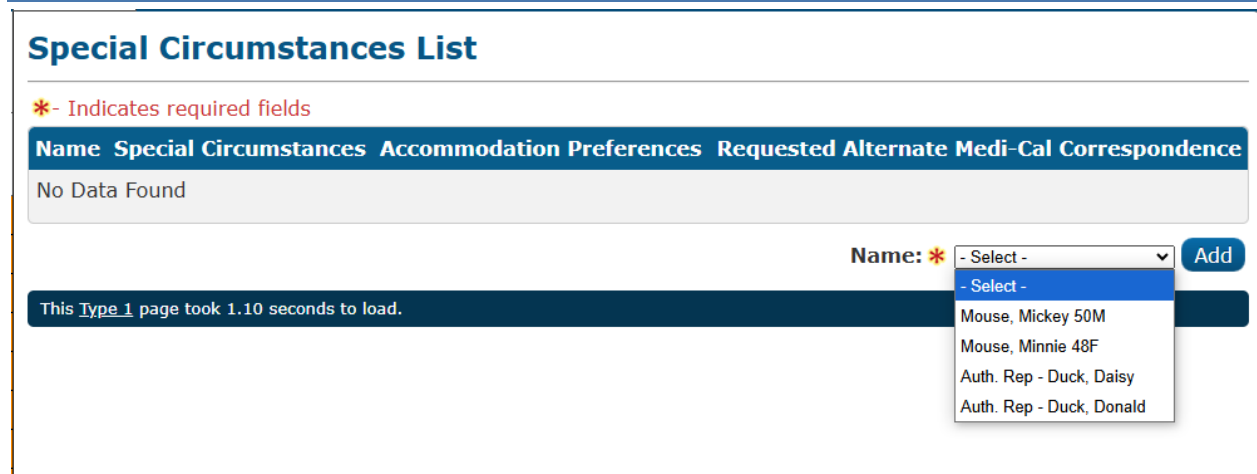


Figure 2.1.1.a – Special Circumstances List

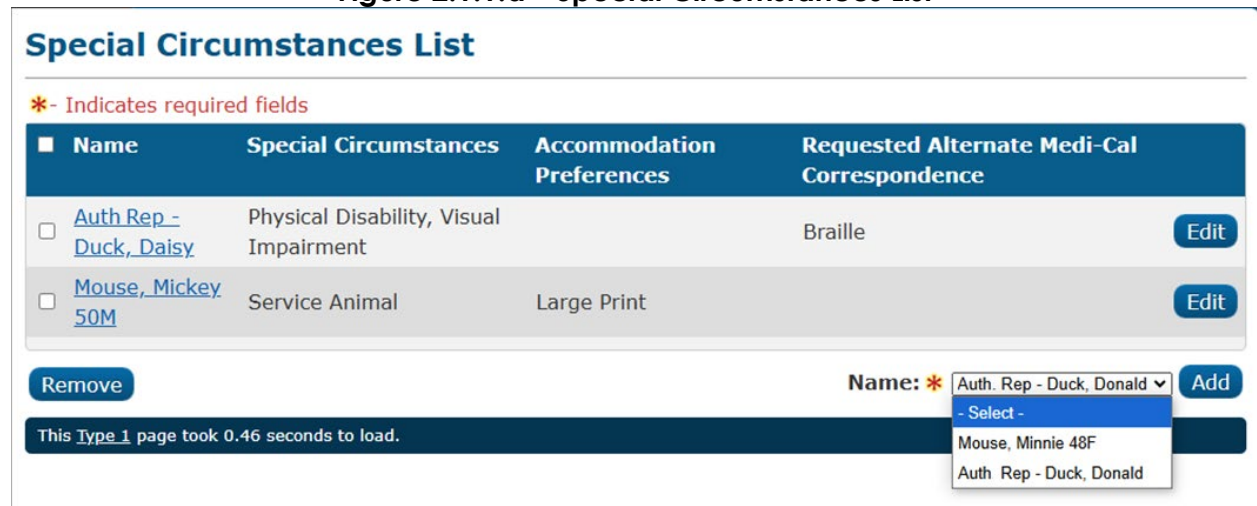


Figure 2.1.1.b – Special Circumstances List

2.1.3 Description of Changes

1. Update the Special Circumstances List page to display Non-Case Person Authorized Representative on the 'Name' drop down field.

- a. Display the Non-Case Person Authorized Representative on the 'Name' drop-down field for that specific case only.
 - i. Name will be displayed on the drop-down field when the following conditions are met:
 1. The Non-Case Person Authorized Representative is associated to the Medi-Cal program.

Note: Medi-Cal is listed on the Program Information section on the Authorized Representative Detail page.
 2. The Begin Date for the Medi-Cal Program for the Non-Case Person Authorized Representative is the same or prior to the system date.

Note: This will be the Begin Date on the Program Information section on the Authorized Representative Detail page.
 3. The End Date for the Medi-Cal Program for the Non-Case Person Authorized Representative is 'Blank'.

Note: This will be the End Date on the Program Information section on the Authorized Representative Detail page.
 4. The Non-Case Person Authorized Representative is marked as 'Yes' as the Additional Correspondence Recipient.

Note: This will be the 'Additional Correspondence Recipient' field found on the Authorized Representative Program Detail page having the value of 'Yes'.
 - ii. Name will be listed after all the Case Person and in alphabetical order.
 - iii. Name will be in the format of "Auth Rep: – [Last Name], [First Name]".
 1. Last Name will be the last name of the Non-Case Person Authorized Representative.
 2. First Name will be the first name of the Non-Case Person Authorized Representative.

Note: The Special Circumstances page will work the same way for Non-Case Person Authorized Representative as a Case Person. This include the order on how the name is being listed on the Name Column (which is based on the First Name in alphabetical order. For Non-Case Person Authorized Representative, it will not consider the 'Auth Rep').

2.1.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Special Circumstances

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update Page Mapping as Non-Case Person Authorized Representative is also being displayed on the Name Column.

2.1.7 Accessibility

This page has been assessed for accessibility requirements and meets Accessibility Standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Special Circumstances Detail

2.2.1 Overview

The Special Circumstances Detail page allows users to enter and view Special Circumstances information for a Case Person. This SCR will allow Special Circumstances record to be created for Non-Case Person Authorized Representative for that specific case as well.

2.2.2 Special Circumstances Detail Mockup

Special Circumstances Detail

*- Indicates required fields

Save Save and Return Cancel

Name:
Auth Rep - Duck, Daisy

Special Circumstances

<input type="checkbox"/> Behavioral	<input type="checkbox"/> Service Animal
<input type="checkbox"/> Hearing Impairment	<input type="checkbox"/> Speech Impairment
<input type="checkbox"/> Literacy	<input type="checkbox"/> Visual Impairment
<input type="checkbox"/> Physical Disability	<input type="checkbox"/> Other
<input type="checkbox"/> Psychiatric or Mental Health Disability	

Accommodation Preferences

<input type="checkbox"/> ADA Rooms	<input type="checkbox"/> Language Line/Interpreter Services
<input type="checkbox"/> ADA Seating	<input type="checkbox"/> Large Print
<input type="checkbox"/> Audio CD	<input type="checkbox"/> Phone Interview
<input type="checkbox"/> Braille	<input type="checkbox"/> Short Window Time
<input type="checkbox"/> Data DVD	<input type="checkbox"/> Other Alternate Format

Requested Alternate Medi-Cal Correspondence

Communication Format:

Notes:

Requested Alternate Medi-Cal Correspondence History

Save Save and Return Cancel

This Type_1 page took 0.64 seconds to load.

Figure 2.2.1. – Special Circumstances Detail (Create Mode)

Special Circumstances Detail

* - Indicates required fields

Save

Save and Return

Cancel

Name:

Auth Rep - Duck, Daisy

Special Circumstances*

- | | |
|--|---|
| <input type="checkbox"/> Behavioral | <input type="checkbox"/> Service Animal |
| <input type="checkbox"/> Hearing Impairment | <input type="checkbox"/> Speech Impairment |
| <input type="checkbox"/> Literacy | <input checked="" type="checkbox"/> Visual Impairment |
| <input checked="" type="checkbox"/> Physical Disability | <input type="checkbox"/> Other |
| <input type="checkbox"/> Psychiatric or Mental Health Disability | |

Accommodation Preferences

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> ADA Rooms | <input type="checkbox"/> Language Line/Interpreter Services |
| <input type="checkbox"/> ADA Seating | <input type="checkbox"/> Large Print |
| <input type="checkbox"/> Audio CD | <input type="checkbox"/> Phone Interview |
| <input type="checkbox"/> Braille | <input type="checkbox"/> Short Window Time |
| <input type="checkbox"/> Data DVD | <input type="checkbox"/> Other Alternate Format |

Requested Alternate Medi-Cal Correspondence

Communication Format:

Braille

Notes:

Requested Alternate Medi-Cal Correspondence History

Old Communication Format Value	New Communication Format Value	Updated Date	Updated By
	Braille	11/18/2024	1387286

Save

Save and Return

Cancel

Created On 11/18/2024 9:47:24 AM By: [1387286](#)

Figure 2.2.2 – Special Circumstances Detail (Edit Mode)

Special Circumstances Detail

* - Indicates required fields

Edit

Close

Name:

Auth Rep - Duck, Daisy

Special Circumstances*

- | | |
|--|---|
| <input type="checkbox"/> Behavioral | <input type="checkbox"/> Service Animal |
| <input type="checkbox"/> Hearing Impairment | <input type="checkbox"/> Speech Impairment |
| <input type="checkbox"/> Literacy | <input checked="" type="checkbox"/> Visual Impairment |
| <input checked="" type="checkbox"/> Physical Disability | <input type="checkbox"/> Other |
| <input type="checkbox"/> Psychiatric or Mental Health Disability | |

Accommodation Preferences

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> ADA Rooms | <input type="checkbox"/> Language Line/Interpreter Services |
| <input type="checkbox"/> ADA Seating | <input type="checkbox"/> Large Print |
| <input type="checkbox"/> Audio CD | <input type="checkbox"/> Phone Interview |
| <input type="checkbox"/> Braille | <input type="checkbox"/> Short Window Time |
| <input type="checkbox"/> Data DVD | <input type="checkbox"/> Other Alternate Format |

Requested Alternate Medi-Cal Correspondence

Communication Format:

Braille

Notes:

Requested Alternate Medi-Cal Correspondence History

Old Communication Format Value	New Communication Format Value	Updated Date	Updated By
	Braille	11/18/2024	1387286

Edit

Close

Created On 11/18/2024 9:47:24 AM By: [1387286](#)

Last Updated On 11/18/2024 10:18:24 AM By: [1387286](#)

This Type 1 page took 0.59 seconds to load.

Figure 2.2.3 – Special Circumstances Detail (View Mode)

2.2.3 Description of Changes

1. Update the Special Circumstances Detail page to display Non-Case Person Authorized Representative on the 'Name' field.
 - a. Automatically display the Non-Case Person Authorized Representative that was selected from the 'Name' drop-down field from the Special Circumstances List page on the 'Name' field.
 - i. Name will be in the format of "Auth Rep: – [Last Name], [First Name]".
 1. Last Name will be the last name of the Non-Case Person Authorized Representative.
 2. First Name will be the first name of the Non-Case Person Authorized Representative.
- Note:** The Special Circumstances Detail page will work the same way for Non-Case Person Authorized Representative as a Case Person.

2.2.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Special Circumstances

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping as Non-Case Person Authorized Representative is also being displayed on the Name Column.

2.2.7 Accessibility

This page has been assessed for accessibility requirements and meets Accessibility Standards.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Case Summary









2.3.1 Overview

The Case Summary page displays a Special Circumstances section and icon when there is a person in the case with a Special Circumstances Detail record. This SCR will update the section to also display Authorized Representatives with Special Circumstances Detail records on the case.

2.3.2 Case Summary Mockup




▼ Special Circumstances			
Name	Special Circumstances	Accommodation Preferences	Requested Alternate Medi-Cal Correspondence
Auth Rep - Duck, Daisy	Physical Disability, Visual Impairment	Braille	Braille
Mouse, Mickey_50M	Service Animal	Large Print	

Figure 2.3.1 – Case Summary Special Circumstances Section

Case Name: Case Name  Case Number: 1076882       

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

Case Summary


Case Name	County	
Case Name	San Bernardino	

Figure 2.3.2 – Special Circumstances icon on Case Summary page (reference only)

2.3.3 Description of Changes

1. Update the Special Circumstances section on the Case Summary page to also list the Special Circumstances Detail record information for Non-Case Person Authorized Representatives.
 - a. The name column will display the name of the Non-Case Person Authorized Representative in the following format “Auth Rep, – [Last Name], [First Name]”.
2. Display the Special Circumstances icon on the Case Summary page when there's a Special Circumstances record for Non-Case Person Authorized Representative.

Note: The order of how the name is listed on the Name Column (which is based on the First Name in alphabetical order) will not consider the title 'Auth Rep' in determining the order for the Non-Case Person Authorized Representative.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

This page has been assessed for accessibility requirements and meets Accessibility Standards.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Utilities Navigation

2.4.1 Overview

The Utilities Navigation bar hover displays the Special Circumstances information when in the context of a case. This SCR will update the section to also display Authorized Representatives with Special Circumstances Detail records on the case.

2.4.2 Utilities Navigation Mockup



Figure 2.4.1 – Case Summary - Special Circumstances hover

2.4.3 Description of Changes

1. Update the Special Circumstances section on the Utilities Navigation Hover to also list the Special Circumstances Detail record information for Non-Case Person Authorized Representatives.
 - a. The name column will display the name of the Non-Case Person Authorized Representative in the following format “Auth Rep - [Last Name], [First Name]”.

Note: The order of how the name is listed on the Name Column (which is based on the First Name in alphabetical order) will not consider the title 'Auth Rep' in determining the order for the Non-Case Person Authorized Representative.

2.4.4 Page Location

N/A

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Accessibility

N/A

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Authorized Representative List

2.5.1 Overview

The Authorized Representative List page display summary information for authorized representatives on a case, view the person or resource name, the program(s) and period for which they are the authorized representative. This SCR will make an update so that user will not be able to remove the Authorized Representative record, if there's a Special Circumstance record for that specific Non-Case Person Authorized Representative.

2.5.2 Authorized Representative List Mockup

Authorized Representative List

* - Indicates required fields

A Special Circumstances record exist for the selected Non-Case Person Authorized Representative. Please remove the Special Circumstances record first in order to remove the Non-Case Person Authorized Representative record.

Program: Display From: To: [View](#)

Search Results Summary Results 1 - 2 of 2

Name	Type	Program	Begin Date	End Date	
<input type="checkbox"/> Automated Test Department	Resource	Medi-Cal	11/01/2024		Edit
<input checked="" type="checkbox"/> Duck, Daisy	Non-Case Person	CalWORKs Medi-Cal	11/01/2024 11/01/2024		Edit

[Remove](#) Type: * - Select - [Add](#)

Figure 2.5.1 – Authorized Representative List

2.5.3 Description of Changes

1. Add a new validation message “A Special Circumstances record exist for the selected Non-Case Person Authorized Representative. Please remove the Special Circumstances record first in order to remove the Non-Case Person Authorized Representative record.” to the Authorized Representative List page. Validation message will be triggered when the user clicks on the ‘Remove’ button and meet the following criteria:
 - a. The selected person has the Type of ‘Non-Case Person’, Program of ‘Medi-Cal’ and have a Special Circumstances record.

2.5.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Authorized Representative**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Accessibility

The following Accessibility enhancements have been identified:

- Table header text should not be empty

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 Add Column to Generate Doc Table (Technical Changes)

2.6.1 Overview

Add a new column to the Generate doc table to store the alternative format requested.

2.6.2 Description of Changes

Add a new column to the "GENERATE_DOC" table to store the alternative format of the Primary participant or their authorized representative.

Technical Note: The value for this column will be retrieved from the Special Circumstances page. Make it as nullable column by default. Below are the 6 available alternative formats:

- Audio Electronic Format - CD
- Audio Electronic Format - CD (password protected)
- Braille
- Data Electronic Format - CD
- Data Electronic Format - CD (password protected)
- Large Print

2.6.3 Programs Impacted

Medical

2.7 Add Column to Print File Table (Technical Changes)

2.7.1 Overview

Add a new column to the Print file table to store the format type.

2.7.2 Description of Changes

Add a new column to the "PRINT_FILE" table to store the format type which is required to differentiate the bundles sent to the central print vendor.

Technical Note: The values can be fetched from Category created in section 2.8. Make it as nullable column by default.

2.7.3 Programs Impacted

Medical

2.8 Create a new Category to store Format types (Technical Changes)

2.8.1 Overview

Add a new category to store the format types.

2.8.2 Description of Changes

Add a new category to store the format types which is required to differentiate the bundles sent to the central print vendor. Below are the two possible format types.

1. Alternative and
2. Companion.

2.9 Render the "View" records – Forms and NOAs

2.9.1 Overview

Currently, the mail documents sent to the central print vendor are rendered, but the English form (View record) generated alongside the threshold form is not rendered, and the PDF is not available in all scenarios. The View record can be accessed by clicking the collapse button next to the 'Date' field on the Distributed Documents page. This update will ensure that the English form (View record) generated alongside the threshold form is also rendered.

2.9.2 Description of Changes

Update the system to render the English form (View record) generated alongside the threshold form for both forms/NOAs generated via online and batch processes.

2.10 Add PDF bookmark metadata string to the "View" records (Technical Changes)

2.10.1 Overview

Currently, the mail documents sent to the central print vendor include metadata, but this metadata is not present in the English form (View record) generated alongside the threshold form. The View record can be accessed by clicking the collapse button next to the 'Date' field on the Distributed Documents page. This task involves adding a PDF bookmark metadata string to the CalSAWS English form (View record) that is generated along with the threshold form.

2.10.2 Description of Change

1. Replicate the metadata from the threshold form onto the English form (View record) generated alongside the threshold form, ensuring both copies contain the same metadata, with the exception to the Language code.

Note: When a participant requests an alternative format, the system will send the correspondence, generated in two separate bundles (alternate and companion), to the central print vendor. The PDF in the alternate bundle is used to generate the alternative format, while the PDF in the companion bundle is used for the regular format. The vendor will take some time to convert the correspondence into the requested alternate format. Once the alternate format is returned to the central print vendor, they will use the metadata to locate the corresponding companion form (regular format), ensuring both formats are mailed to the participant. To facilitate this process, the metadata is included in the English form.

Technical Note: Ensure that the "CORR_ID" barcode metadata on the English form (View record) includes the barcode from the related threshold form. This will require verifying that the barcode data is correctly passed from the threshold form to the English form during the generation process.

Sample PDF Bookmark Metadata String for Forms:

```
<SENDING_LINE1 V="John Doe"/><SENDING_LINE2 V=""/><STREET_ADDRESS V="11290 Pyrites Way, Unit 100"/><CITY V="Rancho Cordova"/><STATE V="CA"/><ZIP V="95670"/><CORR_ID V="15070170"/><COUNTY_ID V="37"/><LANG_CODE V="03"/><CORR_NUMBER V="CW 2208"/><NUM_PAGES V="2"/><CORR_TYPE V="F"/><CASE_NUMBER V="F584200"/><PROG_ID V="815673854"/><PROG_CODE V="CW"/><CASELOAD_NUMBER V="1132"/><OFFICE_ID V="70"/><SYSTEM_DATE V="2023-03-20"/>
```

Sample PDF Bookmark Metadata String for NOAs:

```
<SENDING_LINE1 V="John Doe"/><SENDING_LINE2 V=""/><STREET_ADDRESS V="11290 Pyrites Way, Unit 100"/><CITY V="Rancho Cordova"/><STATE
```

```
V="CA"/><ZIP V="95670"/><CORR_ID V="15070170"/><COUNTY_ID
V="37"/><LANG_CODE V="03"/><CORR_NUMBER V=" M82-820A
(03/15)"/><NUM_PAGES V="2"/><CORR_TYPE V="A"/><CASE_NUMBER
V="F584200"/><PROG_ID V="815673854"/><PROG_CODE
V="CW"/><CASELOAD_NUMBER V="1132"/><OFFICE_ID V="70"/><SYSTEM_DATE
V="2023-03-20"/>
```

2.11 Document Detail Page changes

2.11.1 Overview

The Document Detail page displays some relevant information about a form or NOA that has been generated for a case. This recommendation proposes adding a new field titled "Requested Alternate Format," which will display the alternative format only for the records in Printed – Centrally or Reprinted Centrally status. This will apply to the primary applicant or the authorized representatives to whom the correspondence was mailed.

2.11.2 Description of Change

- 1) Add a new field in the Document Detail page called "Requested Alternate Format" with the new alternative format captured in section 2.8.
- 2) Each "Requested Alternate Format" is specific to the participant (either the primary applicant or the authorized representatives) to whom the correspondence was generated and is stored in the "GENERATE_DOC" table. The "Requested Alternate Format" field represents the alternative format in which the correspondence was mailed (Printed - Centrally) to the customer, alongside the original document generated in CalSAWS. CalSAWS will not utilize this field for any processing other than displaying the information. Please see the screenshot below for reference

Document Detail

[Reprint Locally](#)
[Reprint Centrally](#)
[eSign](#)
[Edit](#)
[Close](#)

Document Information					
Name: Request For Verification (ENG)		Number: CW 2200		Category: Forms	
Program: Medi-Cal		Benefit Month:		Self-Service Portal:	
Date Signed:	Comments:				
Requested Alternate Format: Braille					
Variation	Language	Initial Print Date	Last Central Print Date	Print Status	Mailed Date
Final	English	11/18/2024	11/18/2024	Printed Centrally	11/20/2024

[Reprint Locally](#)
[Reprint Centrally](#)
[eSign](#)
[Edit](#)
[Close](#)

Fig 2.11.2-1 Document Detail page when the form is 'Printed Centrally'

- 3) The reprinted central record on the document detail page will show the requested alternate format if the original printed record was created after the Phase 2 SCR CA-286608 went live in 25.05, and if the participant (either the primary applicant or the authorized representative) has requested an alternative format for the correspondence. Please see below screenshot for Reprint Central.

Document Detail

eSign Edit Close

Document Information						
Name: Request For Verification (ENG)		Number: CW 2200		Category: Forms		
Program: Medi-Cal		Benefit Month:		Self-Service Portal:		
Date Signed:		Comments:				
Requested Alternate Format: Braille						
Variation	Language	Initial Print Date	Last Central Print Date	Print Status	Mailed Date	
Final	English	11/18/2024	11/18/2024	Reprint Centrally	11/20/2024	

eSign Edit Close

Fig 2.11.2-2 Document Detail page when the form is 'Reprinted Centrally'

- 4) If the mail date is null for a correspondence that was "Printed centrally" and has an alternative format, the "Reprint Centrally" button will be disabled. The "Reprint Centrally" button will only be displayed if the mail date is not null or empty. Please see the screenshot below for reference.

Note: Mail date in the document detail page is updated once we get confirmation from the central print vendor that the correspondence is mailed to the participant.

Document Detail

Reprint Locally eSign Edit Close

Document Information						
Name: Request For Verification (ENG)		Number: CW 2200		Category: Forms		
Program: Medi-Cal		Benefit Month:		Self-Service Portal:		
Date Signed:		Comments:				
Requested Alternate Format: Braille						
Variation	Language	Initial Print Date	Last Central Print Date	Print Status	Mailed Date	
Final	English	11/18/2024	11/18/2024	Printed Centrally		

Reprint Locally eSign Edit Close

Fig 2.11.2-3 Document Detail page when the form is 'Printed Centrally' with no Mail Date

Note: The 'Requested Alternate Format' will only be populated if there is alternative format requested for the primary applicant or the authorized representatives from the Special circumstance pages and the participant to whom the correspondence was mailed (Printed – Centrally or Reprinted Centrally).

2.11.3 Page Mapping

Update Page Mapping to reflect the changes being made to Document Detail page.

2.11.4 Programs Impacted

Medical.

2.12 Create the Print File Batch Job for Alternative Formats – Forms

2.12.1 Overview

Create a new print file batch job similar to the existing one (PB00P199/PBXXP200), with the only difference being that this new batch will specifically pick cases that have Alternative Formats requested for the primary applicant or the authorized representatives.

2.12.2 Description of Change

2. Create a new batch job that will find cases that meet all the following conditions.
 - a) The status is 'Printed Centrally (PC)' or 'Reprint Centrally (RC)' with Batch Status Code of 'Batch (BT)' ~~or~~ The status is 'Pending Review (PE)' with Batch Status Code as null.
 - b) The Current program is 'Medical'.
Note: The program id on the generate doc table is Medical and is not null.
 - c) The participant for whom the form was generated should be either the primary applicant or the authorized representatives.
 - d) The primary applicant or the authorized representative for whom the form was generated has requested an alternative format.
Note: Check the Special Circumstances page to verify if an alternative format exists for the primary applicant or the authorized representative.

3. For the primary applicant or the authorized representative who have e-notifications enabled and have requested an alternative format, the system will send the forms except packets via e-notification and also mail them in the requested alternate format.
4. For each record returned from the driving query, insert records into the Print File table.

Technical Note: An external vendor will be able to convert forms generated in all languages within the CalSAWS system to the requested alternative formats in the same language, except for Braille. The vendor can only convert Braille forms if the original form is generated in either English or Spanish. If the form is generated in a language other than English or Spanish, and the alternative format requested is Braille, the vendor will generate the Braille format in English. To support this, the English copy of the threshold form that was generated should be sent along with the threshold form to the vendor.

- a) If the alternative format requested is one of the formats listed below, system will send the same PDF in Alternate and companion bundle to central print vendor. The PDF in the alternate bundle is used to generate the Alternate format and the PDF in the companion bundle is for regular format.

- Audio Electronic Format - CD
- Audio Electronic Format - CD (password protected)
- Data Electronic Format - CD
- Data Electronic Format - CD (password protected)
- Large Print

Technical note: Two records into the Print File table for each record returned by the driving query. One record should have the format type set as 'ALTERNATIVE' with the form that was generated and the other as 'COMPANION'. All columns in the Print File table for the two records will be identical, except for the format type.

- b) If the alternative format requested is Braille and the language in which the form is generated is either 'English' or 'Spanish, system will send the same PDF in Alternate and companion bundle to central print vendor. The PDF in the alternate bundle is used to generate the Alternate format and the PDF in the companion bundle is for regular format.

Technical note: Two records into the Print File table for each record returned by the driving query. One record should have the format type set as 'ALTERNATIVE' with the form that was generated and the other as 'COMPANION'. All columns in the Print File table for the two records will be identical, except for the format type.

- c) If the alternative format requested is " Braille " and the language in which the form is generated is anything other than " English " or " Spanish ", system will send the English PDF in Alternate and threshold PDF in companion bundle to central print vendor. The PDF in the alternate

bundle is used to generate the Alternate format and the PDF in the companion bundle is for regular format.

Technical note: Insert two records into the Print File table for each record returned by the driving query. One record should have the format type set as 'ALTERNATIVE' with the English copy of the threshold form that was generated, and the other should have the format type set as 'COMPANION' with the threshold form that was generated in the non-English language.

2.12.3 Execution Frequency

This is a Daily job. Follows the same schedule as PB00P199.

2.12.4 Key Scheduling Dependencies

The new job will be scheduled to run under SCR CA-286608 as part of 25.05. The successor of this new job is PBXXP200. The predecessor of this new job is PB00P199.

2.12.5 Counties Impacted

All counties.

2.12.6 Data Volume/Performance

The estimated number of record this batch processes is 10,000 per month.

2.12.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.13 Create the Print File Batch Job for Alternative Formats - NOAs

2.13.1 Overview

Create a new print file batch job similar to the existing one (PBXXP300), with the only difference being that this new batch will specifically pick cases that have Alternative Formats requested for the primary applicant, an authorized representative.

2.13.2 Description of Change

1. Create a new batch job that will find cases that meet all the following conditions.
 - a) The status is 'Printed Centrally (PC)' or 'Reprint Centrally (RC)' with Batch Status Code of 'Batch (BT)'.

b) The Current program is 'Medical.

Note: The program id on the generate doc table is Medical and is not null.

c) The participant for whom the NOA was generated should be either the primary applicant or an authorized representative.

d) The primary applicant or an authorized representative for whom the NOA was generated has requested an alternative format.

Note: Check the Special Circumstances page to verify if an alternative format exists for the participant or their authorized representative.

2. For the primary applicant or an authorized representative who have e-notifications enabled and have requested an alternative format, the system will send the NOA's via e-notification and also mail them in the requested alternate format.
3. For each record returned from the driving query, insert records into the Print File table.

Technical Note: An external vendor will be able to convert NOAs generated in all languages within the CalSAWS system to the requested alternative formats in the same language, except for Braille. The vendor can only convert Braille forms if the original NOA is generated in either English or Spanish. If the NOA is generated in a language other than English or Spanish, and the alternative format requested is Braille, the vendor will generate the Braille format in English. To support this, the English copy of the threshold NOA that was generated should be sent along with the threshold NOA to the vendor.

a) If the alternative format requested is one of the formats listed below, system will send the same PDF in Alternate and companion bundle to central print vendor. The PDF in the alternate bundle is used to generate the Alternate format and the PDF in the companion bundle is for regular format.

- Audio Electronic Format - CD
- Audio Electronic Format - CD (password protected)
- Data Electronic Format - CD
- Data Electronic Format - CD (password protected)
- Large Print

Technical note: Two records into the Print File table for each record returned by the driving query. One record should have the format type set as 'ALTERNATIVE' with the NOA that was generated and the other as 'COMPANION'. All columns in the Print File table for the two records will be identical, except for the format type.

b) If the alternative format requested is Braille and the language in which the NOA is generated is either 'English' or 'Spanish, system will send the same PDF in Alternate and companion bundle to central print vendor. The PDF in the alternate bundle is used to generate the Alternate format and the PDF in the companion bundle is for regular format.

Technical note: Two records into the Print File table for each record returned by the driving query. One record should have the format type set

as 'ALTERNATIVE' with the NOA that was generated and the other as 'COMPANION'. All columns in the Print File table for the two records will be identical, except for the format type.

- c) If the alternative format requested is " Braille " and the language in which the NOA is generated is anything other than " English " or " Spanish ", system will send the English PDF in Alternate and threshold PDF in companion bundle to central print vendor. The PDF in the alternate bundle is used to generate the Alternate format and the PDF in the companion bundle is for regular format.

Technical note: Insert two records into the Print File table for each record returned by the driving query. One record should have the format type set as 'ALTERNATIVE' with the English copy of the threshold NOA that was generated, and the other should have the format type set as 'COMPANION' with the threshold NOA that was generated in the non-English language.

2.13.3 Execution Frequency

This is a Daily job. Follows the same schedule as PBXXP300.

2.13.4 Key Scheduling Dependencies

The new job will be scheduled to run under SCR CA-286608 as part of 25.05. The successor of this new job is PBXXP300. The predecessors for these jobs are NOA event streaming jobs.

2.13.5 Counties Impacted

All counties.

2.13.6 Category

None.

2.13.7 Data Volume/Performance

The estimated number of record this batch processes is 10,000 per month.

2.13.8 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.14 Create the Bundling Batch Jobs - 'Alternative' Bundle

2.14.1 Overview

Create a new Bundling batch similar to the existing jobs (PBXXP4XX) for each priority and county, with the only difference being that this new batch will specifically pick cases that have Alternative Formats requested for the primary applicant or an authorized representative.

2.14.2 Description of Change

Create new batch jobs for all counties by priority to process records with a format type of 'Alternative' from the print file table. The records should be processed in the same way as the existing Bundling batch jobs (PBXXP4XX), with the added functionality of creating bundles based on the Alternative format requested for the primary applicant or an authorized representative. Exclude the functionality for populating the BRM barcode, Enclosures, GEN 1365, and updating the customer reporting records. Additionally, update the bundle name to include the requested alternative formats and the format type from section 2.8. Update the batch logic to bundle the records based on the return envelope type.

Technical Note: These new jobs should be a replica of the existing Bundling batch jobs (PBXXP4XX) for all priorities, with the added logic of splitting the bundles based on the alternative format requested and also the return envelope type. Additionally, exclude the functionality for populating the BRM barcode, Enclosures, GEN 1365, and updating the customer reporting records. Return envelope types are stored in category 1482.

Bundle names:

MMDDYYYY_HHMMSS_CC_0_SM_NO_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_1_SM_NO_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_1_SM_EN_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_1_SM_PP_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_2_SM_NO_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_5_FM_PP_NAME_LANG_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_4_FM_PP_NAME_LANG_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_6_FM_NO_NAME_LANG_FORMAT_ALT_001.pdf

CC = County code.

FORMAT = Alternative formats. **For Example:** LGP-Large Print, BRL-Braille, AEN-Audio Electronic Format (not encrypted), DEN-Data Electronic Format (not encrypted), AEE-Encrypted Audio Electronic Format, DEE-Encrypted Data Electronic Format.

ALT = Alternative Bundle.

NAME = Packet name. **For example:** MAGI_BEN_HH, MAGI_RE.

LANG = Language. For example: ENG, SPA, ARA.

Bundle names for LA County:

MMDDYYYY_HHMMSS_CC_AC_0_SM_NO_FORMAT_ALT_001.pdf

MMDDYYYY_HHMMSS_CC_AC_1_SM_NO_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_AC_1_SM_EN_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_AC_1_SM_PP_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_AC_2_SM_NO_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_AC_5_FM_PP_NAME_LANG_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_AC_4_FM_PP_NAME_LANG_FORMAT_ALT_001.pdf
MMDDYYYY_HHMMSS_CC_AC_6_FM_NO_NAME_LANG_FORMAT_ALT_001.pdf

CC = County code.

AC = Agency Code. For example: DP, DC.

FORMAT = Alternative formats requested. **For Example:** LGP-Large Print, BRL-Braille, AEN-Audio Electronic Format (not encrypted), DEN-Data Electronic Format (not encrypted), AEE-Encrypted Audio Electronic Format, DEE-Encrypted Data Electronic Format.

ALT = Alternative Bundle.

NAME = Packet name. **For example:** MAGI_BEN_HH, MAGI_RE.

LANG = Language. For example: ENG, SPA, ARA.

2.14.3 Execution Frequency

This is a Daily job. Follows the same schedule as PBXXP4XX.

2.14.4 Key Scheduling Dependencies

The new job will be scheduled to run under SCR CA-286608 as part of 25.05. The predecessors of this new job will be the existing PB00P350 series jobs, new print file jobs created in the above sections 2.12 and 2.13. The Successors of this new job will be the existing PB00P450 series jobs, Print File Encryption Batch jobs.

2.14.5 Counties Impacted

All counties.

2.14.6 Category

None.

2.14.7 Data Volume/Performance

The estimated number of record this batch processes is 10,000 per month.

2.14.8 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.15 Create the Bundling Batch Jobs - 'Companion' Bundle

2.15.1 Overview

Create a new Bundling batch similar to the existing jobs (PBXXP4XX) for each priority and county, with the only difference being that this new batch will specifically pick cases that have Alternative Formats requested for the primary applicant or an authorized representative.

2.15.2 Description of Change

Create new batch jobs for all counties by priority to process records with a format type of 'Companion' from the print file table. The records should be processed similarly to the existing Bundling batch jobs (PBXXP4XX), with the added functionality of creating bundles by Alternative format requested for the primary applicant or the authorized representatives. Additionally, update the bundle name to include the requested alternative formats and the format type from section 2.8. Update the batch logic to bundle the records based on the return envelope type.

Technical Note: These new jobs should be a replica of the existing Bundling batch jobs (PBXXP4XX) for all priorities, with the added logic of splitting the bundles based on the alternative format requested and also the return envelope type. Return envelope types are stored in category 1482.

Bundle names :

MMDDYYYY_HHMMSS_CC_0_SM_NO_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_1_SM_NO_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_1_SM_EN_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_1_SM_PP_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_2_SM_NO_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_5_FM_PP_NAME_LANG_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_4_FM_PP_NAME_LANG_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_6_FM_NO_NAME_LANG_FORMAT_COM_001.pdf

CC = County code.

FORMAT = Alternative formats requested. **For Example:** LGP-Large Print, BRL-Braille, AEN-Audio Electronic Format (not encrypted), DEN-Data Electronic Format (not encrypted), AEE-Encrypted Audio Electronic Format, DEE-Encrypted Data Electronic Format.

COM = Companion Bundle.

NAME = Packet name. **For example:** MAGI_BEN_HH, MAGI_RE.

LANG = Language. For example: ENG, SPA, ARA.

Bundle names for LA County:

MMDDYYYY_HHMMSS_CC_AC_0_SM_NO_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_AC_1_SM_NO_FORMAT_COM_001.pdf

MMDDYYYY_HHMMSS_CC_AC_1_SM_EN_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_AC_1_SM_PP_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_AC_2_SM_NO_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_AC_5_FM_PP_NAME_LANG_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_AC_4_FM_PP_NAME_LANG_FORMAT_COM_001.pdf
MMDDYYYY_HHMMSS_CC_AC_6_FM_NO_NAME_LANG_FORMAT_COM_001.pdf

CC = County code.

AC = Agency Code. For example: DP, DC.

FORMAT = Alternative formats requested. **For Example:** LGP-Large Print, BRL-Braille, AEN-Audio Electronic Format (not encrypted), DEN-Data Electronic Format (not encrypted), AEE-Encrypted Audio Electronic Format, DEE-Encrypted Data Electronic Format.

COM = Companion Bundle.

NAME = Packet name. **For example:** MAGI_BEN_HH, MAGI_RE.

LANG = Language. For example: ENG, SPA, ARA.

2.15.3 Execution Frequency

This is a Daily job. Follows the same schedule as PBXXP4XX.

2.15.4 Key Scheduling Dependencies

The new job will be scheduled to run under SCR CA-286608 as part of 25.05. The predecessors of this new job will be the existing PB00P350 series jobs, new print file jobs created in the above sections 2.12 and 2.13. The Successors of this new job will be the existing PB00P450 series jobs, Print File Encryption Batch jobs.

2.15.5 Counties Impacted

All counties.

2.15.6 Category

None.

2.15.7 Data Volume/Performance

The estimated number of record this batch processes is 10,000 per month.

2.15.8 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.16 Self-Service Portal - Support Request API

2.16.1 Overview

The Support Request API is a RESTful service that accepts a request from an SSP customer and stores this request as a task for the worker to complete. As part of implementing the Alternate Formats functionality in CalSAWS and the SSP, the Support Request API will be updated to allow the customer to request for a specific alternate format and send this request to the worker. The Support Request API will generate this request as a task in CalSAWS.

2.16.2 Description of Change

1. Update Support Request API POST method to accept an Alternate Format request from the Self-Service Portal. This new support request type will trigger the generation of the new Alternate Format Request Automated Action as documented in Support Request API – Self Service Portal: Alternate Format Request Automated Action.

2.16.3 Execution Frequency

Real-time call.

2.16.4 Key Scheduling Dependencies

N/A.

2.16.5 Counties Impacted

All CalSAWS Counties.

2.16.6 Category

N/A

2.16.7 Data Volume/Performance

Estimated 135,000 individuals will need alternate formats.

2.16.8 Interface Partner

Self-Service Portal

2.16.9 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.)

2.17 Batch & Interfaces -Create and Send new data element 0116 in MEDS transaction

2.17.1 Overview

Create a new data element Alternate Format 0116 in Category 968. This new data element will be sent in RC20, AP18, AP34, EW12, EW20 MEDS Transaction.

2.17.2 Description of Change

1. Create a CTCR to add new data element to category 968:
 - a. Short decode name Alternate Format
 - b. Long decode name Alternate Format=0116
 - c. Refer_table_1_descr 0116
2. Modify the MedsOutboundInterfaceDefinition.xml file and **MedsCdbReconInterfaceDefinition.xml** to add the new data element Alternate Format 0116 to RC20, AP18, AP34, EW12, EW20 MEDS transactions. The length of the data element is 2 and it is optional.
3. Update the logic in RC20, AP18, AP34, EW12, EW20 MEDS transactions to send the data element 0116 Alternate Format in the outbound file. The triggering logic of the above-mentioned transactions are not changing. When these transactions are triggered if the alternate format is available on the Special Circumstance detail page **for the case person(s)**, it should be sent in MEDS outbound file. **Only adding or updating an alternate format for a case person will not trigger any MEDS transaction.** The below table has the acceptable alternate formats, the corresponding code should be sent in the outbound file.

Value	Alternate Format
1	Large Print
2	Audio Electronic Format (not encrypted)
3	Data Electronic Format (not encrypted)
4	Braille
7	County Support
8	Encrypted Data CD
9	Encrypted Audio CD

Note: County Support is not available as a choice in Special Circumstance detail page. The County Support option will be available in a future SCR.

2.17.3 Execution Frequency

No Change.

2.17.4 Key Scheduling Dependencies

No Change.

2.17.5 Counties Impacted

All counties.

2.17.6 Category

None.

2.17.7 Data Volume/Performance

2.17.8 Partner Integration Testing

Yes, Partner Integration testing (PIT) with DHCS is required.

2.17.9 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.18 Support Request API – Self Service Portal: Alternate Format Request Automated Action

2.18.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation on the Automated Action Detail page (Reference CA-214928 – DDID 34 for the specifics of the Automated Action pages). This section outlines the modifications required to implement the Alternate Format Request Automated Actions in the CalSAWS System.

2.18.2 Automated Action Detail Mockup

Automated Action Detail

Edit Close

Action Information

Name: Self Service Portal: Alternate Format Request	Type: Create Task	Status: * Active
Program(s): MC	Run Date: Real Time	Source: Online
Scenario: An Alternate Format Request has been received through the Self Service Portal.		

Task Information

Task Type: *
Alternate Format Request

Due Date: Default Due Date	Default Due Date: 5 business days
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker
Sibling Assignment: No	
Long Description: An Alternate Format Request has been received through the Self Service Portal {param from BC}.	

Edit Close

Figure 2.19.2-1 – Automated Action Detail View Mode

Automated Action Detail

Action Information

Name: Self Service Portal: Alternate Format Request	Type: Create Task	Status: * Active
Program(s): MC	Run Date: Real Time	Source: Online
Scenario: An Alternate Format Request has been received through the Self Service Portal.		

Task Information

Task Type: *
Alternate Format Request

Due Date:
Default Due Date

Initial Assignment:
Default Assignment

Sibling Assignment:
No

Long Description:
An Alternate Format Request has been received through the Self Service Portal {param from BC}.

Default Due Date:
5 business days

Default Assignment:
Current Program Worker

Figure 2.19.2-2 – Automated Action Detail Edit Mode

2.18.3 Description of Change

Implement a Self Service Portal: Alternate Format Request Automated Action. The "Status" attribute on the Automated Action Detail page will not be editable for these Automated Actions and will default to "Active". All other configurable fields will be editable if a county opts to adjust options such as Task Type, Assignment and Due Date.

The Task Types defined below for each Automated Action will be initially set as the default Task Type. Each county may customize to a different county specific Task Type if necessary.

1. Self Service Portal: Alternate Format Request
 - a. Action Information
 - i. Name: Self Service Portal: Alternate Format Request
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): MC
 - v. Run Date: Real Time
 - vi. Source: Online

- vii. Scenario: An Alternate Format Request has been received through the Self Service Portal.

b. Task Information

- i. Task Type: Alternate Format Request
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 5 business days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description: An Alternate Format Request has been received through the Self Service Portal {param from BC}.

c. Create the following Task Type for each County:

- i. Name: Alternate Format Request
- ii. Category: Self Service Portal Communications
- iii. Priority: Medium
- iv. Available Online: No
- v. Available for Automation: Yes
- vi. Instructions: BLANK
- vii. Expire Tasks: No
- viii. Newly Assigned Indicator: Tasks display indicator for 5 day(s)

Note: The Task Type defined above for the Automated Action will be initially set as the default Task Type. Each county may customize to a different county specific Task Type if necessary.

2.18.4 Page Validations

N/A

2.18.5 Page Location

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
Click on the hyperlink of the “Self Service Portal: Alternate Format Request” Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.
The Task Navigation will display if the user profile contains the “AutomatedActionsListView” security right.

2.18.6 Security Name

N/A

2.18.7 Page Mapping

N/A

2.18.8 Accessibility

None.

2.18.9 Page Usage/Data Volume Impacts

2.19 Generated Document: Mailed With Alternate Format Automated Action

2.19.1 Overview

This section outlines the modifications required to support a new Automated Action in the CalSAWS System.

2.19.2 Automated Action Detail Mockup

Automated Action Detail

Edit Close

Action Information		
Name: Generated Document: Mailed With Alternate Format	Type: Create Task	Status: * Active
Program(s): MC	Run Date: Daily (Mon-Sat)	Source: Batch
Scenario: A communication/correspondence that is in an alternate format has been mailed.		
Task Information		
Task Type: * Alternate Format Correspondence Mailed		
Due Date: Default Due Date	Default Due Date: 5 business days	
Initial Assignment: Default Assignment	Default Assignment: Current Program Worker	
Sibling Assignment: No		
Long Description: A communication/correspondence that is in an alternate format has been mailed. Review the Case and take appropriate action.		

Edit Close

Figure 2.20.2-1 – Automated Action Detail View Mode

Automated Action Detail

Action Information

Name: Generated Document: Mailed With Alternate Format	Type: Create Task	Status: * Active
Program(s): MC	Run Date: Daily (Mon-Sat)	Source: Batch
Scenario: A communication/correspondence that is in an alternate format has been mailed.		

Task Information

Task Type: *
Alternate Format Correspondence Mailed ▾

Due Date: Default Due Date ▾	Default Due Date: 5 business days
Initial Assignment: Default Assignment ▾	Default Assignment: Current Program Worker
Sibling Assignment: No ▾	

Long Description:
A communication/correspondence that is in an alternate format has been mailed. Review the Case and take appropriate action.

Figure 2.20.2-2 – Automated Action Detail Edit Mode

2.19.3 Description of Changes

Implement a Generated Document: Mailed With Alternate Format Automated Action. The "Status" attribute on the Automated Action Detail page will not be editable for this Automated Action and will default to "Active". All other configurable fields will be editable if a county opts to adjust options such as Task Type, Assignment and Due Date.

The Task Types defined below for each Automated Action will be initially set as the default Task Type. Each county may customize to a different county specific Task Type if necessary.

1. Generated Document: Mailed With Alternate Format
 - a. Action Information
 - i. Name: Generated Document: Mailed With Alternate Format
 - ii. Type: Create Task
 - iii. Status: Active
 - iv. Program(s): MC

- v. Run Date: Daily (Mon-Sat)
- vi. Source: Batch
- vii. Scenario: A communication/correspondence that is in an alternate format has been mailed.

b. Task Information

- i. Task Type: Alternate Format Correspondence Mailed
- ii. Task Sub-Type: BLANK
- iii. Due Date: Default Due Date
- iv. Default Due Date: 5 business days
- v. Initial Assignment: Default Assignment
- vi. Default Assignment: Current Program Worker
- vii. Sibling Assignment: No
- viii. Long Description: A communication/correspondence that is in an alternate format has been mailed. Review the Case and take appropriate action.

c. Create the following Task Type for each County:

- i. Name: Alternate Format Correspondence Mailed
- ii. Category: Case Update
- iii. Priority: Medium
- iv. Available Online: No
- v. Available for Automation: Yes
- vi. Instructions: BLANK
- vii. Expire Tasks: No
- viii. Newly Assigned Indicator: Tasks display indicator for 5 day(s)

Note: The Task Type defined above for the Automated Action will be initially set as the default Task Type. Each county may customize to a different county specific Task Type if necessary.

2.19.4 Page Validations

N/A

2.19.5 Page Location

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

Click on the hyperlink of the “Generated Document: Mailed With Alternate Format” Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

The Task Navigation will display if the user profile contains the “AutomatedActionsListView” security right.

2.19.6 Security Updates

N/A

2.19.7 Page Mapping

N/A

2.19.8 Accessibility

None

2.19.9 Page Usage/Data Volume Impacts

N/A

2.20 Generated Document: Mailed With Alternate Format Automated Action Batch Job

2.20.1 Overview

This section describes the behavior of a new batch process that will invoke the "Generated Document: Mailed With Alternate Format" Automated Action.

2.20.2 Description of Change

Implement a new batch process to run the 1st day of each month and invoke the "Generated Document: Mailed With Alternate Format" Automated Action.

The batch processing will invoke the Generated Document: Mailed With Alternate Format automated action when a document/communication associated to a Medi-Cal program in an alternate format has been mailed since the last execution of the batch process.

2.20.3 Execution Frequency

The batch job will be scheduled daily (Mon-Sat).

2.20.4 Key Scheduling Dependencies

None.

2.20.5 Counties Impacted

All counties.

2.20.6 Category

Non-Core.

2.20.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.20.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution

2.21 Automated Regression Test

2.21.1 Overview

Create new automated regression test scripts to verify the changes to the Special Circumstances List, Special Circumstances Detail, and Authorized Representative List pages.

Create a new automated regression test script to verify the static details of the Self Service Portal: Alternate Format Request Automated Action.

2.21.2 Description of Change

1. Create new scripts to verify the following scenarios:
 - a. Non-Case Person Authorized Representatives can be selected from the Name dropdown on the Special Circumstances List page.
 - b. Special Circumstances Detail records can be created and saved for Non-Case Person Authorized Representatives. Saved records display on the viewed on the Special Circumstances List page.
 - c. A validation message displays on the Authorized Representative List page when the 'Remove' button is clicked and the selected person has the following:
 - i. Type of 'Non-Case Person'
 - ii. Program of 'Medi-Cal'
 - iii. An existing Special Circumstances record
2. Create a new script to verify the static details of the Self Service Portal: Alternate Format Request Automated Action.

Technical Note: Values that can be updated by a worker on the Automated Action Detail page in edit mode are out of scope for this test.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Interface	Support Requests YAML file	SupportRequestAPI.yaml
2	Interface	Support Requests HTML file	SupportRequestAPI.html

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-270758

Update CAPI, CW batch EDBC sweep job to
trigger CF program

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Edgars Reinholds
	Reviewed By	Caroline Bui, Norma Meza

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/11/2024	1.0	Initial Design	Edgars Reinholds
10/2/2024	1.1	Removed batch jobs that didn't need to be updated.	Edgars Reinholds
12/3/2024	1.2	Removed PI19C808 job per LA County review.	Edgars Reinholds
2/26/2025	1.3	Design clarification on the program list for batch EDBC	Edgars Reinholds
3/4/2025	1.4	Design clarification on existing batch schedule.	Edgars Reinholds
3/10/2025	1.5	Content Revision	Edgars Reinholds

Table of Contents

1	Overview	4
	1.1 Current Design.....	4
	1.2 Requests.....	6
	1.3 Overview of Recommendations.....	6
	1.4 Assumptions	6
2	Recommendations	8
	2.1 Update EDBC Sweeps to Targeted Program mode.....	8
	2.1.1 Overview	8
	2.1.2 Description of Change.....	8
	2.1.3 Execution Frequency.....	8
	2.1.4 Key Scheduling Dependencies.....	8
	2.1.5 Counties Impacted	9
	2.1.6 Category	9
	2.1.7 Data Volume/Performance.....	9
	2.1.8 Failure Procedure/Operational Instructions.....	9
3	Requirements	10
	3.1 Project Requirements.....	10

1 OVERVIEW

This SCR will update the EDBC Sweeps that trigger EDBC in Single Program mode to trigger EDBC in Targeted Program mode.

1.1 Current Design

The following batch jobs trigger EDBC in Single Program mode for their respective programs.

- a. PB19E467 DCFS Non-Medical Overlapping Sweep.
 - i. Programs: CalWORKs (CW)
 - ii. Counties: 19
 - iii. Trigger Conditions:
 1. Active or Pending Foster Care (FC) or Kin-GAP (KG) programs as of the batch run.
 2. The same participant is also Active on CW with Member role as of the batch run.
 3. The participant has a current placement of type of
 - a. Foster Family Agency (Intensive Programs)
 - b. Group Home
 - c. Out of State Basic
 - d. Out of State Residential Treatment Facilities
 - e. Out of State Institutions
 - f. Foster Family Home
 - g. Foster Family Home-Shelter Care
 - h. Specialized Foster Family Home
 - i. Foster Family Agency (Treatment)
 - j. Foster Family Agency (Nontreatment)
 - k. Hospital
 - l. Tribal Specific Home
 - m. Probation Department
 - n. Supervised Independent Living
 - o. Transitional Housing Placement+FC (THP+FC)
 - p. Transitional Housing Placement Program (THPP)
 - q. Multidimensional
 - r. Short Term Residential Therapeutic Program
 - s. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
 - t. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)
 - u. Out of State Short-Term Residential Therapeutic Program County Shelter/Receiving Home (Non EA/AFDC)
 - v. Foster Family Agency
 - w. Community Treatment Facility
 4. Or the participant has a placement type of and a payee with parental control
 - a. Relative Home

- b. Nonrelative Extended Family Member Home
 - c. Legal Guardian
 - d. Small Family Home
 - e. Adoptive Homes
 - f. Resource Family Home (RFH)
 - g. Court Specified Home
 - h. Guardian Home
- iv. Runs monthly on the last day of the month.
- v. Updates Household status to Permanently Out of the Home with reason Child in Foster Care/ Kin-GAP
- vi. Create Journal Entry "Child temporarily removed from home."
- vii. End Dates Purchase and Prep as of the batch date.
- viii. Remove child from the expense contributors.
- ix. Trigger regular EDBC with timely notice exemption for the following month.
- x.
- b. PB00E917 CAPI RD Disc Sweep.
 - i. Programs: CAPI
 - ii. Counties:
 - 02,05,06,08,10,11,13,14,15,16,17,18,20,22,23,26,28,29,31,32,34,35,37,38,39,40,41,42,43,45,46,48,49,50,52,53,54,55,56,58
 - iii. Trigger Conditions:
 - 1. Active CAPI program as of the batch date.
 - 2. Redetermination due date is in the batch month and is not completed.
 - iv. Runs monthly 1 day prior to batch 10-day.
 - v. Triggers negative action EDBC with reason of CAPI RE Not Complete up to come-up month.
- c. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination.
 - i. Programs: CAPI
 - ii. Counties: 19
 - iii. Trigger Conditions:
 - 1. Active CAPI program as of the batch date.
 - 2. CAPI Annual Agreement is in Sent, Incomplete, or Error status and report month is in the batch month.
 - 3. EDBC is Regular and Accepted and Saved and effective in the batch month.
 - iv. Runs monthly 1 day prior to batch 10-day.
 - v. Triggers negative action EDBC with reason of CAPI RE Not Complete up to come-up month.
 - vi.
- d. PB00E141 CW RE Disc Sweep.
 - i. Programs: CalWORKs, CalFresh
 - ii. Counties: All
 - iii. Trigger Conditions:

1. Customer report CW RE Packet or CW/CF RE Packet has reporting month in the batch month and status is not "Not Applicable".
 2. EDBC is Regular and Accepted and Saved and effective in the following month.
 3. CW or CF program is active in the following month.
 4. Redetermination is due in the batch month and is not completed.
- iv. Runs monthly on the last day of the month.
 - v. Trigger negative action EDBC when the report has the following statuses.
 1. Sent, Generated, or Error
 - a. Negative action reason of "RE Not Received"
 2. Incomplete, Reviewed- Ready to Run EDBC, or Received
 - a. Negative action reason of "RE Incomplete"
 - vi. Trigger regular EDBC when report doesn't have the above statuses.

1.2 Requests

1. Update the following batch jobs to trigger EDBC in Targeted Program mode by including CalFresh and Supplemental Nutrition Benefit programs
 - a. PB19E467 DCFS Non-Medical Overlapping Sweep.
 - b. PB00E917 CAPI RD Disc Sweep.
 - c. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination.
 - d. PB00E141 CW RE Disc Sweep.

1.3 Overview of Recommendations

1. Update the following batch jobs to trigger EDBC in Targeted Program mode by including CalFresh and Supplemental Nutrition Benefit programs
 - a. PB19E467 DCFS Non-Medical Overlapping Sweep.
 - b. PB00E917 CAPI RD Disc Sweep.
 - c. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination.
 - d. PB00E141 CW RE Disc Sweep.

1.4 Assumptions

1. Targeted Program mode triggers regular EDBC on the programs specified in PGM_LIST if they are active in the same case and on the specified benefit month.

2. CalFresh and SNB EDBC would be triggered going forward the next time the batch jobs would run.
3. There is another job that PB19E466 that runs on the batch 10 day and if discontinuance occurs, it will create all the existing NOAs. PB19E467 on the other hand runs on the last business day of the month with timely notice exemption. So, if discontinuance occurs then the existing NOAs would still be generated.
4. This SCR is meant to synchronize CF and SNB programs as they are dependent on other program's determination. For example, when PB00E917 or PB00E183 would trigger a negative action for CAPI program, then that would impact CF because the CAPI income would no longer be counted. So, CF should be reevaluated through a regular EDBC to account for the removed CAPI income.
5. The schedule is not changing for any of the batch jobs mentioned in this SCR.

2 RECOMMENDATIONS

2.1 Update EDBC Sweeps to Targeted Program mode

2.1.1 Overview

Update EDBC Sweeps to trigger EDBC in Targeted Program mode by including CalFresh (CF) and Supplemental Nutrition Benefit (SNB) programs.

2.1.2 Description of Change

1. Update the following batch jobs to trigger EDBC in Targeted Program mode by including CalFresh and/or Supplemental Nutrition Benefit programs.
 - i. PB19E467 DCFS Non-Medical Overlapping Sweep.
 1. Trigger CalWORKs program in Targeted Program Mode.
 2. Update to trigger EDBC for the following month and come-up month.
 3. Set the program list to "CW;FS;NB:SNB".
 - ii. PB00E917 CAPI RD Disc Sweep.
 1. Trigger CAPI program in Targeted Program Mode.
 2. Set the program list to "CP;FS;NB:SNB".
 - iii. PB00E183 Discontinue CAPI for Non-Recipient or Incomplete Redetermination.
 1. Trigger CAPI program in Targeted Program Mode.
 2. Set the program list to "CP;FS;NB:SNB".
 - iv. PB00E141 CW RE Disc Sweep.
 1. Trigger CalFresh in Targeted Program Mode.
 - a. Set the program list to "FS;NB:SNB".
 2. Trigger CalWORKs in Targeted Program Mode.
 - a. Set the program list to "CW;FS;NB:SNB"

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Category

Core.

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.21	The LRS shall automate eligibility determination and benefit calculation for certain individual and case changes.	EDBC will be also triggered for CalFresh and Supplemental Nutrition Benefit programs.

CalSAWS

California Statewide Automated Welfare System



CA-283209

Update Report Tasks to Auto Close

DOCUMENT APPROVAL HISTORY

Prepared By	Vallari Bathala
Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena, Carlos Albances

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
11/04/2024	1.0	Initial Revision	Vallari Bathala

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions	1
2	RECOMMENDATIONS	2
2.1	Customer Report Auto Closure Automated Action	2
2.1.1	Overview	2
2.1.2	Automated Action Detail Mockup	2
2.1.3	Description of Changes	5
2.1.4	Page Validations	6
2.1.5	Page Location	6
2.1.6	Security Updates	6
2.1.7	Page Mapping	6
2.1.8	Accessibility	6
2.1.9	Page Usage/Data Volume Impacts	6
2.2	Customer Report Auto Closure Automated Action Batch Job	6
2.2.1	Overview	6
2.2.2	Description of Change	7
2.2.3	Execution Frequency	7
2.2.4	Key Scheduling Dependencies	7
2.2.5	Counties Impacted	8
2.2.6	Category	8
2.2.7	Data Volume/Performance	8
2.2.8	Failure Procedure/Operational Instructions	8
2.3	Automated Regression Test	8
2.3.1	Overview	8
2.3.2	Description of Change	8
3	SUPPORTING DOCUMENTS	9
4	REQUIREMENTS	10
4.1	Project Requirements	10
5	OUTREACH	11
6	APPENDIX	12

CA-283209 – Update Report Tasks to Auto Close

1 OVERVIEW

This design describes the creation of Customer Reports Auto Closure Automated Action.

1.1 Current Design

The CalSAWS System includes functionality to create Tasks in an automated fashion via the Automated Action framework. This framework allows a level of configuration for automated Tasks that can be maintained by the Counties. There are no Automated Actions to close Tasks that are associated to Customer Report documents in an automated fashion.

1.2 Requests

1. Create a new Automated Action allowing counties to enable/disable auto closure of Tasks that are associated to a Customer Report document.

1.3 Overview of Recommendations

1. Implement an Automated Action to automatically close Customer Report Tasks once the Customer Report document reaches an end status.

1.4 Assumptions

1. The Customer Reports available in the new Automated Action are derived from Customer Reporting Detail page, with the exception of 'Controlled Forms' which are not accessible from the Customer Reporting Detail page.
2. Tasks processed by this Automated Action are those that are associated directly to a Customer Report. Tasks are associated directly to a Customer Report when Document Routing Rule processing of a scanned document identifies a Customer Report from the barcode of the scanned document.

2 RECOMMENDATIONS

2.1 Customer Report Auto Closure Automated Action

2.1.1 Overview

This section outlines the modifications required to support the new Automated Action in the CalSAWS System.

2.1.2 Automated Action Detail Mockup

Automated Action Detail

Edit Close

Action Information

Name: Customer Report Auto Closure **Type:** Complete Task **Status:** * Active

Program(s): All Programs **Run Date:** Daily(Mon-Sat) **Source:** Batch

Scenario:
 For the Customer Report Types that have a Enable value of "Yes", processing will identify the Customer Reports that have reached the Status displayed in the End Status column, then retrieve any Assigned or In-Process Tasks that are associated to these Customer Reports and Complete the Task(s).

Customer Report Type	End Status	Enable
48-70-20	Complete- EDBC Accepted	Yes
AAP RE Packet	Complete- EDBC Accepted	Yes
ABP 1463	Reviewed	Yes
ABP 1463 DVS	Received	Yes
ABP 1464	Reviewed	Yes
ABP 1467 DVS	Reviewed	Yes
ABP 1467 MHS	Reviewed	Yes
ABP 1469	Reviewed	Yes
ABP 1469 DRC	Reviewed	Yes
ABP 1469 DVS	Reviewed	Yes
CAPI Annual Agreement	Complete- EDBC Accepted	Yes
CCRR	Complete	Yes
CF RE Packet	Complete- EDBC Accepted	Yes
CSF 124	Complete	Yes
CSF 125	Complete	Yes
CSF 126	Complete	Yes
CW 7	Complete- EDBC Accepted	Yes
CW 7-GR	Complete- EDBC Accepted	Yes
CW RE Packet	Complete- EDBC Accepted	Yes
CW/CF RE Packet	Complete- EDBC Accepted	Yes
Controlled Forms	Received	Yes
County Adult Assistance Program 1	Complete- EDBC Accepted	Yes
DSS GA 213	Complete- EDBC Accepted	Yes
Former Foster Youth Packet	Complete- EDBC Accepted	Yes
GA 3007_34N	Complete- EDBC Accepted	Yes
GA-QR3	Complete- EDBC Accepted	Yes
GA-QR7	Complete- EDBC Accepted	Yes
GA/GR RE Packet	Complete- EDBC Accepted	Yes
GN 6008	Reviewed	Yes
GN 6070	Reviewed	Yes
GN 6365	Reviewed	Yes
General Relief Annual Agreement	Complete- EDBC Accepted	Yes
General Relief Annual Renewal Packet	Complete- EDBC Accepted	Yes
Kin-GAP RE Packet	Complete- EDBC Accepted	Yes
MAGI RE Packet	Complete- EDBC Accepted	Yes
Mixed Household RE Packet	Complete- EDBC Accepted	Yes
MAGI RE Packet	Complete- EDBC Accepted	Yes
Mixed Household RE Packet	Complete- EDBC Accepted	Yes
Non-MAGI RE Packet	Complete- EDBC Accepted	Yes
Non-MAGI Screening Packet	Complete- EDBC Accepted	Yes
Non-MAGI Turning 65 Packet	Complete- EDBC Accepted	Yes
QR 7	Complete- EDBC Accepted	Yes
QR 7 (12/08)	Complete- EDBC Accepted	Yes
SAR 7	Complete- EDBC Accepted	Yes
SAR 7 (12/14)-SCL	Complete- EDBC Accepted	Yes
SAR 7 - GR	Complete- EDBC Accepted	Yes
SAR 72	Complete- EDBC Accepted	Yes
SAR 73	Complete- EDBC Accepted	Yes
TMC 176 S	Complete- EDBC Accepted	Yes
TNB 4 RE Packet	Complete- EDBC Accepted	Yes
YCS8	Complete- EDBC Accepted	Yes

Edit Close

Figure 2.1.2-1 – Automated Action Detail View Mode

Automated Action Detail

Action Information

Name: Customer Report Auto Closure
Type: Complete Task
Status: * Active

Program(s): All Programs
Run Date: Daily (Mon-Sat)
Source: Batch

Scenario:

For the Customer Report Types that have a Enable value of "Yes", processing will identify the Customer Reports that have reached the Status displayed in the End Status column, then retrieve any Assigned or In-Process Tasks that are associated to these Customer Reports and Complete the Task(s).

Customer Report Type	End Status	Enable
48-70-20	Complete- EDBC Accepted	Yes
AAP RE Packet	Complete- EDBC Accepted	Yes
ABP 1463	Reviewed	Yes
ABP 1463 DVS	Received	Yes
ABP 1464	Reviewed	Yes
ABP 1467 DVS	Reviewed	Yes
ABP 1467 MHS	Reviewed	Yes
ABP 1469	Reviewed	Yes
ABP 1469 DRC	Reviewed	Yes
ABP 1469 DVS	Reviewed	Yes
CAP Annual Agreement	Complete- EDBC Accepted	Yes
CCRR	Complete	Yes
CF RE Packet	Complete- EDBC Accepted	Yes
CSF 124	Complete	Yes
CSF 125	Complete	Yes
CSF 126	Complete	Yes
CW 7	Complete- EDBC Accepted	Yes
CW 7-GR	Complete- EDBC Accepted	Yes
CW RE Packet	Complete- EDBC Accepted	Yes
CW/CF RE Packet	Complete- EDBC Accepted	Yes
Controlled Forms	Received	Yes
County Adult Assistance Program 1	Complete- EDBC Accepted	Yes
DSS GA 213	Complete- EDBC Accepted	Yes
Former Foster Youth Packet	Complete- EDBC Accepted	Yes
GA 3007_34N	Complete- EDBC Accepted	Yes
GA-QR3	Complete- EDBC Accepted	Yes
GA-QR7	Complete- EDBC Accepted	Yes
GA/GR RE Packet	Complete- EDBC Accepted	Yes
GN 6008	Reviewed	Yes
GN 6070	Reviewed	Yes
GN 6365	Reviewed	Yes
General Relief Annual Agreement	Complete- EDBC Accepted	Yes
General Relief Annual Renewal Packet	Complete- EDBC Accepted	Yes
Kin-GAP RE Packet	Complete- EDBC Accepted	Yes
MAGI RE Packet	Complete- EDBC Accepted	Yes
Mixed Household RE Packet	Complete- EDBC Accepted	Yes
MAGI RE Packet	Complete- EDBC Accepted	Yes
Mixed Household RE Packet	Complete- EDBC Accepted	Yes
Non-MAGI RE Packet	Complete- EDBC Accepted	Yes
Non-MAGI Screening Packet	Complete- EDBC Accepted	Yes
Non-MAGI Turning 65 Packet	Complete- EDBC Accepted	Yes
QR 7	Complete- EDBC Accepted	Yes
QR 7 (12/08)	Complete- EDBC Accepted	Yes
SAR 7	Complete- EDBC Accepted	Yes
SAR 7 (12/14)-SCL	Complete- EDBC Accepted	Yes
SAR 7 - GR	Complete- EDBC Accepted	Yes
SAR 72	Complete- EDBC Accepted	Yes
SAR 73	Complete- EDBC Accepted	Yes
TMC 176 S	Complete- EDBC Accepted	Yes
TNB 4 RE Packet	Complete- EDBC Accepted	Yes
YC58	Complete- EDBC Accepted	Yes

Figure 2.1.2-2 – Automated Action Detail Edit Mode

2.1.3 Description of Changes

1. Action Information

Implement a Customer Report Auto Closure Automated Action. The Automated Action will have an initial status of Inactive for all counties.

1. Customer Report Auto Closure
 - a. Action Information
 - i. Name: Customer Report Auto Closure
 - ii. Type: Complete Task
 - iii. Status: Inactive
 - iv. Program(s): All Programs
 - v. Run Date: Daily (Mon-Sat)
 - vi. Source: Batch
 - vii. Scenario: For the Customer Report Types that have a Enable value of "Yes", processing will identify the Customer Reports that have reached the Status displayed in the End Status column, then retrieve any Assigned or In-Process Tasks that are associated to these Customer Reports and Complete the Task(s).
2. Add two new buttons below 'Scenario'. These buttons will only display on the Automated Action Detail page for this specific Automated Action:
 - a. **BUTTON:** Enable All – This button will display when:
 - i. The page is in Edit mode

When clicked, all the dropdown values available in the "Enable" column will be set to "Yes".
 - b. **BUTTON:** Disable All – This button will display when:
 - i. The page is in Edit mode

When clicked, all the dropdown values available in the "Enable" column will be set to "No".
3. Add a new table below the 'Enable All' and 'Disable All' buttons for this specific Automated Action. The following fields and columns will display in this table:
 - a. Customer Report Type – This column will display the list of Customer Report types. The full list is available in [Section 3. Supporting Documents](#).
 - b. End Status – This column will display the end status for each Customer Report type. This end status is a reference attribute indicating which status the Customer Report Type must reach before any associated Tasks are automatically closed by this Automated Action. The full list is available in [Section 3. Supporting Documents](#).

- c. Enable – This column will display a dropdown field for each Customer Report Type allowing for granular configurability of auto Task closure by Customer Report type. Options included are:
 - i. Yes (Default)
 - ii. No

2.1.4 Page Validations

N/A

2.1.5 Page Location

Automated Action Detail Page:

- **Global:** Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin

Click on the hyperlink of the “Customer Report Auto Closure” Automated Action result displayed in the Automated Actions Search to navigate to the Automated Action Detail page.

The Task Navigation will display if the user profile contains the “AutomatedActionsListView” security right.

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

Create Page Mapping for new columns in Action Information section.

2.1.8 Accessibility

None.

2.1.9 Page Usage/Data Volume Impacts

N/A

2.2 Customer Report Auto Closure Automated Action Batch Job

2.2.1 Overview

This section describes the behavior of a new batch process that will invoke the “Customer Report Auto Closure” Automated Action.

2.2.2 Description of Change

Implement a new batch process to run daily Monday – Saturday and invoke the “Customer Report Auto Closure” Automated Action.

For counties that have activated the Automated Action, the batch processing will retrieve Tasks in an Assigned or In Process Status that are associated to a Customer Report type that is enabled on the Automated Action Detail page and the Customer Report has reached the End Status indicated on the Automated Action Detail page since the last run of the batch job.

Tasks that are associated to a “SAR 7”, “CW/CF RE Packet” or “SAR 72” Customer Report type will have one additional processing step because these Customer Reports have 2 unique status progressions: one for CalWORKs and one for CalFresh. For these Tasks, the Program that is associated to the Task will be used to retrieve the Customer Report Status for that particular program.

For example: A “SAR 7” Customer Report has the following statuses on the Customer Reporting List page:

CW – Complete – EDBC Accepted

CF – Received

There are two Tasks associated to this Customer Report: one for CalWORKs, one for CalFresh:

Task 1: CalWORKs

Task 2: CalFresh

Processing of Task 1 will retrieve the Customer Report Status for CalWORKs, which is “Complete – EDBC Accepted”, which has reached an End Status.

Task 2 will not be included because the Customer Report Status for CalFresh, which is “Received” is not an End Status.

Tasks that have been appended to will be excluded from the processing.

Tasks retrieved by the above process will be updated to a Status of Complete.

Note: A Task is associated to a Customer Report type by way of Document Routing Rule processing. More specifically, when a document is scanned and the barcode of the document is associated to a Customer Report, the resulting Task is associated to that Customer Report via a data attribute.

2.2.3 Execution Frequency

The batch job will be scheduled daily (Mon-Sat).

2.2.4 Key Scheduling Dependencies

None.

2.2.5 Counties Impacted

All CalSAWS Counties.

2.2.6 Category

Non-Core.

2.2.7 Data Volume/Performance

There are no expected data volume/performance concerns.

2.2.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate failures and determine the appropriate resolution.

2.3 Automated Regression Test


2.3.1 Overview

Create new automated regression test scripts to verify the static values of the Customer Report Auto Closure Automated Action displayed on the Automated Action Detail page.

2.3.2 Description of Change

1. Create a new regression script to verify the static values of the Customer Report Auto Closure Automated Action on the Automated Action Detail page.
2. **Technical Note:** Any values that can be updated in edit mode are outside the scope of this scenario, including the dropdowns in the 'Enable' column of the new table.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Task Management	Customer Report Types and End Statuses	 Customer Reports and End Statuses.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.5	The LRS shall allow COUNTY-specified Users to access alerts, reminders, and controls by using the following criteria in order to initiate a search: a. All alerts, reminders, and controls on a case or a file; b. A specified due date or a range of due dates; c. Type of alert, reminder, or control; and d. Status of alert, reminder, or control.	1. Implement an Automated Action to automatically clear Customer Reports Tasks once EDBC processes the Reports.

5 OUTREACH

N/A

6 APPENDIX

N/A