# CalSAWS

California Statewide Automated Welfare System

Design

# CA-206913

ACL 18-94: ABAWD Correspondence - Threshold Languages

| | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
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# CA-206913 - ACL 18-94: ABAWD Correspondence - Threshold Languages

## 1 OVERVIEW

The purpose of this change is to update the existing English and Spanish CF 377.11, CF 377.11A and CF 377.11B to match the latest version and add the available threshold languages to CalSAWS Template Repository and add threshold languages to the ABAWD NOAs.

### 1.1 Current Design

Currently CF 377.11 (6/18), CF 377.11A (6/18), CF 377.11B (9/23) forms are available in English and Spanish languages in CalSAWS.
Not all the languages in CalSAWS have ABAWD NOAs.

### 1.2 Requests

1. Update the CF 377.11 (6/18) to CF 377.11 (11/23) CalFresh Time Limit Notice Failure to Meet the ABAWDs Work Requirement in English and Spanish and available threshold languages to CalSAWS Template Repository.
   **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Lao, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
2. Update the CF 377.11A (6/18) to CF 377.11A (11/23) CalFresh Time Limit Notice Expiration of Three Consecutive Months for ABAWDs in English and Spanish and available threshold languages to CalSAWS Template Repository.
   **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
3. Add CF 377.11B (9/23) CalFresh Countable Month Letter Use of Countable Month for ABAWDs in available threshold languages to CalSAWS Template Repository.
   **Languages Include:** Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
4. Update and add threshold languages to the NOA reason for CF 377.11 with NOA code F716C (Snippet ID: 7611) to match the latest version CF 377.11(11/23).
   **Update Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
5. Add threshold languages to Action Fragment (Snippet ID: 4125)
   **Languages Include:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
6. Update and add threshold languages to Message Fragment (Snippet ID: 5102)
   **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.

7. Add NOA reason for 'End of 3 Consecutive ABAWD Months' with NOA code F717C (Snippet ID: 7612) in available threshold languages.
   **Languages Include:** Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
8. Add available threshold languages to Action Fragment (Snippet ID: 4005)
   **Languages Include:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
9. Add available threshold languages to Message Fragment (Snippet ID: 5004)
   **Languages Include:** Hmong, Lao, Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
10. Update and add threshold languages to the NOA reason for CF 377.11 with NOA code F716T (Snippet ID: 7613) to match the latest version CF 377.11 (11/23).
    **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
11. Add threshold languages to Action Fragment (Snippet ID: 4126)
    **Languages Include:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
12. Update and add threshold languages to Message Fragment (Snippet ID: 5103)
    **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.

## 1.3 Overview of Recommendations

1. Update the CF 377.11 (6/18) to CF 377.11 (11/23) CalFresh Time Limit Notice Failure to Meet the ABAWDs Work Requirement in English and Spanish and available threshold languages to CalSAWS Template Repository.
   **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Lao, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
2. Update the CF 377.11A (6/18) to CF 377.11A (11/23) CalFresh Time Limit Notice Expiration of Three Consecutive Months for ABAWDs in English and Spanish and available threshold languages to CalSAWS Template Repository.
   **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
3. Add CF 377.11B (9/23) CalFresh Countable Month Letter Use of Countable Month for ABAWDs in available threshold languages to CalSAWS Template Repository.
   **Languages Include:** Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
4. Update and add threshold languages to the NOA reason for CF 377.11 with NOA code F716C (Snippet ID: 7611) to match the latest version CF 377.11(11/23).

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

5. Add threshold languages to Action Fragment (Snippet ID: 4125)
   **Languages Include:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
6. Update and add threshold languages to Message Fragment (Snippet ID: 5102)
   **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
7. Add NOA reason for 'End of 3 Consecutive ABAWD Months' with NOA code F717C (Snippet ID: 7612) in available threshold languages.
   **Languages Include:** Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
8. Add available threshold languages to Action Fragment (Snippet ID: 4005)
   **Languages Include:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
9. Add available threshold languages to Message Fragment (Snippet ID: 5004)
   **Languages Include:** Hmong, Lao, Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
10. Update and add threshold languages to the NOA reason for CF 377.11 with NOA code F716T (Snippet ID: 7613) to match the latest version CF 377.11 (11/23).
    **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
11. Add threshold languages to Action Fragment (Snippet ID: 4126)
    **Languages Include:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.
12. Update and add threshold languages to Message Fragment (Snippet ID: 5103)
    **Languages Include:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.

## 1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish forms.
2. All fields (blank or prepopulated) will be editable.
3. The triggering conditions of the NOA Fragments for Threshold Generation remains the same as English and are not being updated.
4. The NOA template remains the same and is not being updated.
5. The existing variable population is not being updated with this effort.
6. Supporting Documents section references attachments found on Jira

# 2  RECOMMENDATIONS

## 2.1  Update and add available threshold languages for CF 377.11 in CalSAWS.

### 2.1.1  Overview

This effort will update the CF 377.11 form to match the latest version in English and Spanish and add additional threshold languages to CalSAWS Template Repository.

**State Form:** CF 377.11 (11/23)
**Programs:** CalFresh
**Attached Forms:** NA BACK 9
**Forms Category:** Forms
**Template Repository Visibility:** All counties
**Form Title (Document List Page Displayed Name):**
CalFresh Time Limit Notice Failure to Meet the ABAWDs Work Requirement
**Template Description:** Notice to Customers that their CalFresh will be discontinued because they failed to comply with the Able-Bodied Adults without Dependents work requirements.
**Imaging Form Name:** CF Time Limit Fail Meet ABAWD Work Req
**Imaging Document Type:** CalFresh (CF)

### 2.1.2  Form Verbiage

**Update and Create XDP's in Threshold languages.**
Existing xdps will be updated and new xdps will be created for CF 377.11 in threshold languages.
**Languages include:** English, Spanish, Armenian, Arabic, Cambodian, Lao, Chinese*, Farsi, Hindi, Hmong, Japanese, Korean, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
> *One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Header:** CalSAWS Standard Header #1 (Header_1)
**Include NA Back 9:** Yes
**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.

### 2.1.4  Form Generation Conditions

The CF 377.11 form will be generated through the Template Repository.

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

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

**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 CF 377.11 Form |
|---|---|
| Mail-To (Recipient) | Applicant selected on the Document Parameters. |
| Mailed From (Return) | Worker's Office Address |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | Standard |
| Return Envelope Type | N/A |
| Special Paper Stock | N/A |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|---|---|---|
| N | N | Y |

**Additional Options:**

| Requirement | Option for CF 377.11 Form |
|---|---|
| Post to Self-Service Portal | Y |

## 2.2 Update and add available threshold languages for CF 377.11A in CalSAWS.

### 2.2.1 Overview

This effort will update the CF 377.11A form to match the latest version in English and Spanish and add additional threshold languages to CalSAWS Template Repository

**State Form:** CF 377.11A (11/23)
**Programs:** CalFresh.

**Attached Forms:** NA BACK 9
**Forms Category:** Forms
**Template Repository Visibility:** All counties
**Form Title (Document List Page Displayed Name):**
CalFresh Time Limit Notice Expiration of Three Consecutive Months for ABAWDs
**Template Description:** CalFresh Time Limit Notice Expiration of Three Consecutive Months for ABAWDs.
**Imaging Form Name:** CF Time Limit Exp 3 Consec Mnth ABAWD
**Imaging Document Type:** CalFresh (CF)

## 2.2.2 Form Verbiage

**Update and Create XDP's in Threshold languages.**
Existing xdps will be updated and new xdps will be created for CF 377.11A in threshold languages.
**Languages include:** English, Spanish, Armenian, Arabic, Cambodian, Lao, Chinese*, Farsi, Hindi, Hmong, Japanese, Korean, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
> *One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Header:** CalSAWS Standard Header #1 (Header_1)
**Include NA Back 9:** Yes
**Form Mockups/Examples:** See supporting document #2

## 2.2.3 Form Variable Population

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

## 2.2.4 Form Generation Conditions

The CF 377.11A form will be generated through Template Repository and Batch.
**Required Document Parameters:** Customer Name, Case Number, Program, Language.

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

**Form generation batch jobs**
PB00R537 batch job must include CF 377.11A in English and newly added threshold languages.

Technical Note: Update CT942_11A (CF 377.11A)

**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 CF 377.11A Form |
|---|---|
| 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 | N/A |
| Outgoing Envelope Type | Standard |
| Return Envelope Type | N/A |
| Special Paper Stock | N/A |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|---|---|---|
| N | N | Y |

**Additional Options:**

| Requirement | Option for CF 377.11A Form |
|---|---|
| Post to Self-Service Portal | Y |

## 2.3  Add available threshold languages for CF 377.11B in CalSAWS.

### 2.3.1 Overview

This effort will add additional languages to the CF 377.11B form in CalSAWS Template Repository.

**State Form:** CF 377.11B (9/23)
**Programs:** CalFresh
**Attached Forms:** No
**Forms Category:** Forms
**Template Repository Visibility:** All counties
**Form Title (Document List Page Displayed Name):**
CalFresh Countable Month Letter Use of Countable Month for ABAWDs
**Template Description:** Notice to Customers that they received a countable month of Able-Bodied Adults without Dependents (ABAWDs) benefits.
**Imaging Form Name:** Use of Countable Month for ABAWD

**Imaging Document Type:** CalFresh (CF)

## 2.3.2 Form Verbiage

**Create XDP's in Threshold languages.**
New xdps will be created for CF 377.11B in threshold languages.
**Threshold Languages:** Armenian, Arabic, Cambodian, Chinese*, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Punjabi, Russian, Tagalog, Thai, Ukrainian and Vietnamese.
> *One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

**Form Header:** CalSAWS Standard Header #1 (Header_1)
**Include NA Back 9:** <mark>No</mark>
**Form Mockups/Examples:** See supporting document #3

## 2.3.3 Form Variable Population

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

## 2.3.4 Form Generation Conditions

The Cf 377.11B form will be generated through Template Repository and Batch.
**Required Document Parameters:** Customer Name, Case Number, Program, Language.

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

**Form generation batch jobs**
PB00R536 batch job must include CF 377.11B in English and newly added threshold languages.

Technical Note: Update CT942_11B (CF 377.11B)

**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 CF 377.11B Form |
|---|---|
| Mail-To (Recipient) | Applicant selected on the Document Parameters page when |

| Mailing Options | Option for CF 377.11B Form |
|---|---|
|  | generated through Template Repository and Primary Applicant when generated through Batch. |
| Mailed From (Return) | Worker's Office Address |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | Standard |
| Return Envelope Type | N/A |
| Special Paper Stock | N/A |

**Form Control:**

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|---|---|---|
| N | N | Y |

**Additional Options:**

| Requirement | Option for CF 377.11B Form |
|---|---|
| Post to Self-Service Portal | Y |

## 2.4  Update and add NOA reason for CF 377.11 with NOA code F716C

### 2.4.1  Overview

This effort will update and add NOA reason for CF 377.11 with NOA code F716C (Snippet ID: 7611) in English and available Threshold Languages to the latest version CF 377.11 (11/23)

**Reason Fragment Name and ID:** CF_CH_ABAWD_NO_MEETING_WORK_RULE_F716 (Fragment ID: 7611)
**State Form/NOA:** CF 377.11 (11/23)
**Current NOA Template:** CF_NOA_TEMPLATE
**Current Program(s):** CalFresh
**Current Action Type:** Change
**Current Fragment Level:** Program
**Currently Repeatable:** N
**Include NA Back 9:** Yes
**Existing Languages:**  English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 2.4.2  Form/NOA Verbiage

**Update Fragment XDP**

This effort will update the verbiage on CF 377.11 with NOA code F716C to be consistent with the most recent version (11/23).

**Update Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese,

Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

**Add Threshold Languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

| Description | Existing Text | New Text | Formatting* |
|---|---|---|---|
| Static | &lt;Person&gt; got CalFresh for &lt;MonthYear1&gt;, &lt;MonthYear2&gt;, and &lt;MonthYear3&gt; without meeting the ABAWD work requirement which is described below. | &lt;Person&gt; got CalFresh for &lt;MonthYear1&gt;, &lt;MonthYear2&gt;, and &lt;MonthYear3&gt; without meeting the ABAWD work requirement, which is described below. | Arial, Size 10 |

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

### 2.4.3   Form/NOA Population

#### Add/Update Fragment Variable Population
The page footer is currently being generated with the old revision date. This should be updated to generate the latest revision date – CF 377.11 (11/23).

#### Add/Update Fragment Regulations
No Updates to Fragment Regulations

#### Add/Update NOA Title and Footer Reference for new Reason

**Updated NOA Title:** No Updates to NOA Title
*NOA Title Requires Translations:* N
**Updated NOA Footer:** CF 377.11 (11/23)
*NOA Footer Requires Translations:* N

### 2.4.4   Form/NOA Generation Conditions
There will be no updates to generation conditions.

## 2.5   Add Threshold Languages to Action Fragment.

### 2.5.1   Overview
This effort will add the Action Fragment (Snippet ID: 4125) in available Threshold Languages.

**Action Fragment Name and ID:**  CF_CH_ACTION8 (fragment ID: 4125)
**Current NOA Template:** CF_ NOA_TEMPLATE
**Current Program(s):** CalFresh
**Existing Languages:**  English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

### 2.5.2 Form/NOA Verbiage

New XDPs will be created for action fragment in threshold languages.

**Threshold languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

### 2.5.3 Form/NOA Variable Population

No updates to variable population.

### 2.5.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

This action fragment should generate along with reason fragment added in recommendation 2.4.

## 2.6 Update and add Threshold Languages to Message Fragment.

### 2.6.1 Overview

This effort will add the Message Fragment (fragment ID: 5102) in available Threshold Languages.
**Message Fragment Name and ID:** CF_CH_MESSAGE8 (ID: 5102)
**Current NOA Template:** CF _NOA_TEMPLATE
**Current Program(s):** CalFresh
**Existing Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 2.6.2 Form/NOA Verbiage

New XDPs will be created for message fragment in threshold languages.

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

**Add Threshold Languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

| Description | Existing Text | New Text | Formatting* |
|---|---|---|---|
| Static | You will be required to work, be excused from the work requirement or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period. | You will be required to work, be excused from the work requirement, or<br>have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period. | Arial, Size 10 |

| | | | |
|---|---|---|---|
| highlighted text in existing text to be removed | **HOW TO KEEP GETTING CALFRESH**<br>You can continue getting CalFresh if you:<br>• Meet the work requirement by showing proof that for at least 20 hours per week on average or 80 hours per month, you are:<br>• Working, including self-employment;<br>• Going to school or training;<br>• Doing volunteer work, community service or in-kind work (working in exchange for goods or services instead of money);<br>• Participating in Employment & Training (E&T);<br>• Participating in job search up to 9 hours per week in combination with other work activities; or<br>• Doing a combination of any of the above.<br>• Go to workfare for the number of hours determined by the county, if available.<br>• Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available.<br>• Meet one of the following excuses from the work requirement:<br>• Under age 18 or over age ;<br>• Physically or mentally unable to work 20 hours per week for a total of 80 hours per month;<br>• Applying for or getting disability benefits (including veterans disability benefits);<br>• Applying for or getting unemployment insurance benefits (UIB);<br>• ==Chronically homeless;==<br>• Struggling with drugs or alcohol;<br>• A victim of domestic violence;<br>• Going to school at least half-time (additional student eligibility rules may apply);<br>• Pregnant;<br>• Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling or the child of another person living in the home who is part of the CalFresh household);<br>• Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); or | **HOW TO KEEP GETTING CALFRESH**<br>You can continue getting CalFresh if you:<br>• Meet the work requirement by showing proof that, for at least 20 hours<br>per week on average or 80 hours per month, you are:<br>• Working, including self-employment;<br>• Going to school or training;<br>• Doing volunteer work, community service, or in-kind work (working in exchange for goods or services instead of money);<br>• Participating in Employment & Training (E&T);<br>• Participating in job search up to 9 hours per week in combination with other work activities; or<br>• Doing a combination of any of the above.<br>• Go to workfare for the number of hours determined by the county, if available.<br>• Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available.<br>• Meet one of the following excuses from the work requirement:<br>• Under age 18 or over age <Variable>;<br>• Physically or mentally unable to work 20 hours per week for a total of 80 hours per month;<br>• Applying for or getting disability benefits (including veterans disability benefits);<br>• Applying for or getting unemployment insurance benefits (UIB);<br>• Struggling with drugs or alcohol;<br>• A victim of domestic violence;<br>• Going to school at least half-time (additional student eligibility rules may apply);<br>• Pregnant;<br>• Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling, or the child of another person living in the home who is part of the CalFresh household);<br>• Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); | |

| | | Meeting or excused from the CalWORKs Welfare-to-Work rules. **If you think you met the work requirement, may be excused from the work requirement or have a good reason for not meeting the work requirement, contact your county as soon as possible.** <u>IF YOU LOSE CALFRESH, YOU MAY REAPPLY</u><br>• If you meet the work requirement during a period of 30 days in a row.<br>• At any time if you become excused from the work requirement.<br>• If you move to an area where the time limit is waived.<br>• On or after January 1, <mark>2020</mark> when the 36-month period restarts. | • Meeting or excused from the CalWORKS Welfare-to-Work rules;<br>• <mark>Experiencing homelessness;</mark><br>• <mark>A veteran who served in the armed forces of the United States (this includes veterans who were honorably or dishonorably discharged); or</mark><br>• <mark>Under age 25 and in Foster Care on 18th birthday.</mark><br>**If you think you met the work requirement, may be excused from the work requirement, or have a good reason for not meeting the work requirement, contact your county as soon as possible.** <u>IF YOU LOSE CALFRESH, YOU MAY REAPPLY</u><br>• If you meet the work requirement during a period of 30 days in a row.<br>• At any time if you become excused from the work requirement.<br>• If you move to an area where the time limit is waived.<br>• On or after January 1, <mark>2023</mark>, when the 36-month period restarts. | |
| Static | **36-MONTH PERIOD**<br>During a 36-month period you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation. | **36-MONTH PERIOD**<br>During a 36-month period, you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation. | Arial, Size 10 |
| Static | **MANDATORY REPORTS**<br>You are required to contact the county when you have either:(update)<br>• Received gross monthly income over the Income Reporting Threshold (IRT); <mark>or</mark><br>• A reduction in ABAWD work hours below 20 hours per week for a total of 80 hours per month. | **MANDATORY REPORTS**<br>You are required to contact the county when you have:<br>• Received gross monthly income over the Income Reporting Threshold (IRT);<br>• A reduction in ABAWD work hours below 20 hours per week for a total of 80 hours per month; <mark>or</mark><br>• <mark>Won at least $_____ in a lottery or by gambling.</mark> | Arial, Size 10 |

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

### 2.6.3 Form/NOA Variable Population

| Section | Field | Description |
|---------|-------|-------------|
| **<1>** | Lottery/Gambling winning limit | This will be a variable that populates the gambling/lottery winnings limit value. (CT335_85) |

### 2.6.4  Form/NOA Generation Conditions

No updates to existing trigger conditions.
This message fragment should generate along with reason fragment added in recommendation 2.4.

## 2.7  Add Threshold Languages to 'End of 3 Consecutive ABAWD Months' with NOA code F717C

### 2.7.1  Overview

This effort will add NOA reason for 'End of 3 Consecutive ABAWD Months' with NOA code F717C (Snippet ID: 7612)

**Reason Fragment Name and ID:** CF_CH_ABAWD_3CONS_MONTHS_F717 (Fragment ID: 7612)
**State Form/NOA:** NA 290
**Current NOA Template:** CF_NOA_TEMPLATE
**Current Program(s):** CalFresh
**Current Action Type:** Change
**Current Fragment Level:** Program
**Currently Repeatable:** N
**Include NA Back 9:** Yes
**Existing Languages:**  English and Spanish

### 2.7.2  Form/NOA Verbiage

**Create XDP's in Threshold languages.**

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

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

**NOA Mockups/Examples:** See Supporting Documents #4

### 2.7.3  Form/NOA Variable Population

No updates to variable population.

### 2.7.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

## 2.8 Add Threshold Languages to Action Fragment.

### 2.8.1 Overview

This effort will add the Action Fragment (Snippet ID: 4005) in available Threshold Languages.

**Action Fragment Name and ID:** CF_CH_ACTION1 (fragment ID: 4005)
**Current NOA Template:** CF_ NOA_TEMPLATE
**Current Program(s):** CalFresh
**Existing Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 2.8.2 Form/NOA Verbiage

New XDPs will be created for action fragment in threshold languages.

**Add Threshold Languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

### 2.8.3 Form/NOA Variable Population

No updates to variable population.

### 2.8.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.
This action fragment should generate along with reason fragment added in recommendation 2.7

## 2.9 Add Threshold Languages to Message Fragment.

### 2.9.1 Overview

This effort will add the Message Fragment (fragment ID: 5004) in available Threshold Languages.
**Message Fragment Name and ID:** CF_CH_MESSAGE1 (ID: 5004)
**Current NOA Template:** CF _NOA_TEMPLATE
**Current Program(s):** CalFresh
**Existing Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Korean, Russian, Tagalog, and Vietnamese.

### 2.9.2 Form/NOA Verbiage

New XDPs will be created for message fragment in threshold languages.

**Add Threshold Languages:** Hmong, Lao, Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

### 2.9.3  Form/NOA Variable Population

No updates to variable population.

### 2.9.4  Form/NOA Generation Conditions

No updates to existing trigger conditions.
This message fragment should generate along with reason fragment added in recommendation 2.7

## 2.10  Update and add NOA reason for CF 377.11 with NOA code F716T

### 2.10.1 Overview

This effort will Update and add NOA reason for CF 377.11 with NOA code F716T (Snippet Id: 7613) in English and available Threshold Languages to the latest version CF 377.11 (11/23)

**Reason Fragment Name and ID:**
CF_TN_ABAWD_NO_WORK_RULE_AND_3CONS_MOTHNS_F716
(Fragment ID: 7613)
**State Form/NOA:** CF 377.11 (11/23)
**Current NOA Template:** CF_NOA_TEMPLATE
**Current Program(s):** CalFresh
**Current Action Type:** Discontinuance
**Current Fragment Level:** Program
**Currently Repeatable:** N
**Include NA Back 9:** Yes
**Existing Languages:**  English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 2.10.2 Form/NOA Verbiage

#### Update Fragment XDP

This effort will change the verbiage on CF 377.11 with NOA code F716T to be consistent with the most recent version (11/23).

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

**Add Threshold Languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

| Description | Existing Text | New Text | Formatting* |
|---|---|---|---|
| Static | <Person> got CalFresh for <MonthYear1>, <MonthYear2>, and <MonthYear3> without meeting the ABAWD work requirement which is described below. | <Person> got CalFresh for <MonthYear1>, <MonthYear2>, and <MonthYear3> without meeting the ABAWD work requirement, which is described below. | Arial, Size 10 |

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

### 2.10.3 Form/NOA Population

**Add/Update Fragment Variable Population**

The page footer is currently being generated with the old revision date. This should be updated to generate the latest revision date – CF 377.11 (11/23).

**Add/Update Fragment Regulations**

No Updates to Fragment Regulations

**Add/Update NOA Title and Footer Reference for new Reason**

**Updated NOA Title:** No Updates to NOA Title
*NOA Title Requires Translations:* N
**Updated NOA Footer:** CF 377.11 (11/23)
*NOA Footer Requires Translations:* N

### 2.10.4 Form/NOA Generation Conditions

There will be no updates to generation conditions.

## 2.11 Add Threshold Languages to Action Fragment.

### 2.11.1 Overview

This effort will add the Action Fragment (Snippet ID: 4126) in available Threshold Languages.

**Action Fragment Name and ID:** CF_TN_ACTION8 (fragment ID: 4126)
**Current NOA Template:** CF_ NOA_TEMPLATE
**Current Program(s):** CalFresh
**Existing Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 2.11.2 Form/NOA Verbiage

New XDPs will be created for action fragment in threshold languages.

**Threshold languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

### 2.11.3 Form/NOA Variable Population

No updates to variable population.

### 2.11.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.
This action fragment should generate along with reason fragment added in recommendation 2.10

## 2.12 Update and add Threshold Languages to Message Fragment.

### 2.12.1 Overview

This effort will add the Message Fragment (fragment ID: 5103) in available Threshold Languages.
**Message Fragment Name and ID:** CF_CH_MESSAGE8 (ID: 5103)
**Current NOA Template:** CF_NOA_TEMPLATE
**Current Program(s):** CalFresh
**Existing Languages:** English, Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.

### 2.12.2 Form/NOA Verbiage

New XDPs will be created for message fragment in threshold languages.

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

**Add Threshold Languages:** Hindi, Japanese, Mien, Punjabi, Thai and Ukrainian.

**NOA Mockups/Examples:** See Supporting Documents #4

| Description | Existing Text | New Text | Formatting* |
|---|---|---|---|
| Static | You will be required to work, be excused from the work requirement or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period. **HOW TO KEEP GETTING CALFRESH** You can continue getting CalFresh if you: • Meet the work requirement by showing proof that for at least 20 hours per week on average or 80 hours per month, you are: | You will be required to work, be excused from the work requirement, or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period. **HOW TO KEEP GETTING CALFRESH** You can continue getting CalFresh if you: • Meet the work requirement by showing proof that, for at least 20 hours | Arial, Size 10 |

| | | |
|---|---|---|
| highlighted text in existing text to be removed | • Working, including self-employment;<br>• Going to school or training;<br>• Doing volunteer work, community service or in-kind work (working in exchange for goods or services instead of money);<br>• Participating in Employment & Training (E&T);<br>• Participating in job search up to 9 hours per week in combination with other work activities; or<br>• Doing a combination of any of the above.<br>• Go to workfare for the number of hours determined by the county, if available.<br>• Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available.<br>• Meet one of the following excuses from the work requirement:<br>• Under age 18 or over age ;<br>• Physically or mentally unable to work 20 hours per week for a total of 80 hours per month;<br>• Applying for or getting disability benefits (including veterans disability benefits);<br>• Applying for or getting unemployment insurance benefits (UIB);<br>• ==Chronically homeless;==<br>• Struggling with drugs or alcohol;<br>• A victim of domestic violence;<br>• Going to school at least half-time (additional student eligibility rules may apply);<br>• Pregnant;<br>• Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling or the child of another person living in the home who is part of the CalFresh household);<br>• Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); or<br>• Meeting or excused from the CalWORKs Welfare-to-Work rules.<br>**If you think you met the work requirement, may be excused from the work requirement or have a good reason for not meeting the work requirement, contact your county as soon as possible**<br><br>**IF YOU LOSE CALFRESH, YOU MAY REAPPLY** | per week on average or 80 hours per month, you are:<br>• Working, including self-employment;<br>• Going to school or training;<br>• Doing volunteer work, community service, or in-kind work (working in exchange for goods or services instead of money);<br>• Participating in Employment & Training (E&T);<br>• Participating in job search up to 9 hours per week in combination with other work activities; or<br>• Doing a combination of any of the above.<br>• Go to workfare for the number of hours determined by the county, if available.<br>• Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available.<br>• Meet one of the following excuses from the work requirement:<br>• Under age 18 or over age <Variable>;<br>• Physically or mentally unable to work 20 hours per week for a total of 80 hours per month;<br>• Applying for or getting disability benefits (including veterans disability benefits);<br>• Applying for or getting unemployment insurance benefits (UIB);<br>• Struggling with drugs or alcohol;<br>• A victim of domestic violence;<br>• Going to school at least half-time (additional student eligibility rules may apply);<br>• Pregnant;<br>• Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling, or the child of another person living in the home who is part of the CalFresh household);<br>• Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home);<br>• Meeting or excused from the CalWORKs Welfare-to-Work rules;<br>• ==Experiencing homelessness;==<br>• ==A veteran who served in the armed forces of the United States (this includes veterans who were honorably or dishonorably discharged); or==<br>• ==Under age 25 and in Foster Care on 18th birthday.==<br>**If you think you met the work requirement, may be excused from the work requirement, or have a** | |

| | | | |
|---|---|---|---|
| | • If you meet the work requirement during a period of 30 days in a row.<br>• At any time if you become excused from the work requirement.<br>• If you move to an area where the time limit is waived.<br>• On or after January 1, ==2020== when the 36-month period restarts. | **good reason for not meeting the work requirement, contact your county as soon as possible.**<br>__IF YOU LOSE CALFRESH, YOU MAY REAPPLY__<br>• If you meet the work requirement during a period of 30 days in a row.<br>• At any time if you become excused from the work requirement.<br>• If you move to an area where the time limit is waived.<br>• On or after January 1, ==2023==, when the 36-month period restarts. | |
| Static | **36-MONTH PERIOD**<br>During a 36-month period you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation. | **36-MONTH PERIOD**<br>During a 36-month period, you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation. | Arial, Size 10 |
| Static | **MANDATORY REPORTS**<br>You are required to contact the county when you have either:(update)<br>• Received gross monthly income over the Income Reporting Threshold (IRT); ==or==<br>• A reduction in ABAWD work hours below 20 hours per week for a total of 80 hours per month. | **MANDATORY REPORTS**<br>You are required to contact the county when you have:<br>• Received gross monthly income over the Income Reporting Threshold (IRT);<br>• A reduction in ABAWD work hours below 20 hours per week for a total of 80 hours per month; or<br>• ==Won at least $_____ in a lottery or by gambling.== | Arial, Size 10 |

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

### 2.12.3 Form/NOA Variable Population

| Section | Field | Description |
|---|---|---|
| **<1>** | Lottery/Gambling winning limit | This will be a variable that populates the gambling/lottery winnings limit value.<br>(CT335_85) |

### 2.12.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.
This message fragment should generate along with reason fragment added in recommendation 2.10

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | Correspondence | CF 377.11 Form | CF377.11_mockups.zip |
| 2 | Correspondence | CF 377.11A Form | CF377.11A_mockups.zip |
| 3 | Correspondence | CF 377.11B Form | CF377.11B_mockups.zip |
| 4 | Correspondence | NOA Verbiage | Fragments_Verbiage.xlsx |

# CalSAWS

California Statewide Automated Welfare System

THE POWER OF 58

## CA-209953

Performance Enhancement: LAUSD file process

| | DOCUMENT APPROVAL HISTORY | |
|---|---|---|
| **CalSAWS** | Prepared By | Eric Delaney |
| | Reviewed By | John Pratt |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 1/30/2025 | 1 | Initial Draft | Eric Delaney |
| 3/26/2025 | 1.1 | Added PIT sections | Eric Delaney |
| | | | |

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# CA-209953 – Performance Enhancement: LAUSD file process

## 1 OVERVIEW

LAUSD LA unified file runs long due to segregated address fields. Update batch for the file to use only one of the below options:
1. A single address field
2. Standard "addressLine1" and "addressLine2" fields.

### 1.1 Current Design

Currently the LAUSD LA unified file has address fields segregated into STREET NUM, FRACTION, PRE DIR, STREET NAME, STREET TYPE, UNIT NUM, CITY, STATE, ZIP. LAUSD file size is increasing, and it is causing delays in processing / finishing the Direct Certification batch job for the schools. When the address is segmented as such, there is a retrieve, return, save and repeat for each record, hence the long processing time.

### 1.2 Requests

Treat the Direct Cert Address sort process similar to other Interfaces, using only one of the below options:
1. A single address field
2. Standard "addressLine1 and "addressLine2" fields.

This process is expected to increase the performance of the Batch Job to complete within its normal timeframe for all School Districts.

### 1.3 Overview of Recommendations

1. Update batch to use only one of the below options:
   a. A single address field
   b. Standard "addressLine1" and "addressLine2" fields.

### 1.4 Assumptions

1. Combining segregated address fields will improve performance.

# 2 RECOMMENDATIONS

## 2.1 LA School Lunch Writer

### 2.1.1 Overview

The LAUSD LA unified file has address fields segregated. Update batch for the file to use only one of the below options:
1. A single address field
2. Standard "addressLine1" and "addressLine2" fields.

### 2.1.2 Description of Change

1. The LAUSD LA unified file has address fields segregated into STREET NUM, FRACTION, PRE DIR, STREET NAME, STREET TYPE, UNIT NUM, CITY, STATE, ZIP. Update Outbound LA School Lunch Writer (PO19E712) to combine the segregated fields using only one of the below options:
   a. A single address field
   b. Standard "addressLine1" and "addressLine2" fields.

### 2.1.3 Partner Integration Testing

Yes. After programming changes are made, CalSAWS will generate outbound LAUSD test file which will be sent to partner. Partner will review test file and validate that the data is satisfactory.

### 2.1.4 Execution Frequency

Monthly 10th Day

### 2.1.5 Key Scheduling Dependencies

No scheduling changes. Runs after B_R2DABE00.

### 2.1.6 Counties Impacted

Los Angeles

### 2.1.7 Category

Core

### 2.1.8 Data Volume/Performance

Number of records processed should not change. Change is expected to improve job performance, processing same number of records in shorter time.

### 2.1.9 Interface Partner

Los Angeles county

## 2.1.10 Failure Procedure/Operational Instructions

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

# CalSAWS

California Statewide Automated Welfare System



CA-237514

Update Customer Appointment Detail Page
to generate WTW 100

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| CalSAWS | Prepared By | Nithin Halesh, Trevor Torres | |
| | Reviewed By | | |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 12/27/2024 | 1.0 | Initial Draft | Nithin Halesh |
| 1/13/2025 | 1.1 | Added Online changes | Trevor Torres |
| 02/28/2025 | 1.2 | • Any reference to removing the option of 'Time Limit Review' from the Appointment Type is removed from the design document.<br>• Section 2.2.2.2 is updated to add more clarification along with a note to state that the WTW 100 will be generated from the Customer Appointment Detail page when the Print Appointment Letter is checked and the Category is WTW/REP and Appointment-Type is Good Cause/Exemption. | Kusnadi.E |
| 03/10/2025 | 1.3 | • Added additional Assumption for removal of Time Limit Review | Trevor Torres |

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# CA-237514 Update Customer Appointment Detail Page to generate WTW 100

## 1  OVERVIEW

The purpose of this SCR is to add new Appointment Type, "Good Cause/Exemption," under the "WTW/REP" category and to generate the WTW 100 - Good Cause/Exemption Letter when saving the Customer Appointment Detail page for appointments of this type within the "WTW/REP" category.

### 1.1  Current Design

1.  Currently, WTW100 Good Cause/Exemption Letter is available in Template Repository.

### 1.2  Requests

1.  Add new Appointment Type "Good Cause/Exemption" under the Category "WTW/REP".
2.  Add online trigger for generating the WTW 100 - Good Cause/Exemption Letter on the Customer Appointment Detail page for all 58 counties.

### 1.3  Overview of Recommendations

1.  Add new Appointment Type "Good Cause/Exemption" under the Category "WTW/REP".
2.  Add online trigger for generating the WTW 100 - Good Cause/Exemption Letter on the Customer Appointment Detail page for all 58 counties.

### 1.4  Assumptions

1.  All existing functionalities will remain unchanged unless called out as part of this SCR.
2.  SCR CA-288665 will remove the "Time Limit Review" Appointment-Type option from the Customer Appointment Detail page, as additional discussion is needed to address Historical Records.

# 2 RECOMMENDATIONS

## 2.1 Update Customer Appointment Detail Page

### 2.1.1 Overview

This SCR will add the new Appointment Type "Good Cause/Exemption" under the Category "WTW/REP".

### 2.1.2 Customer Appointment Detail Mockup



**Figure 2.1.1 – Customer Appointment Detail New Appointment-Type Option Mockup**

### 2.1.3 Description of Changes

1. Update the Appointment-Types on the Customer Appointment Detail page when the Category is WTW/REP.
   a. Create a new WTW/REP Appointment-Type: "Good Cause/Exemption" that will appear in alphabetical order on the Appointment-Type drop-down, as seen in Figure 2.1.1.

### 2.1.4 Page Location

- **Global:** Case Info
- **Local:** Customer Schedule
- **Task:** Add Appointment

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

Update Page Mapping to accommodate the new fields/updates being done to the page.

### 2.1.7 Accessibility

Accessibility was accessed and no changes are needed.

### 2.1.8 Page Usage/Data Volume Impacts

N/A

## 2.2  Add Online Trigger for WTW 100 form

### 2.2.1  Overview

This effort will add the online trigger for WTW 100 form on saving the Customer Appointment Detail page for the new Appointment Type, "Good Cause/Exemption," under the "WTW/REP" category.

**State Form:** WTW 100 (9/20)
**Programs:** Welfare To Work, REP
**Attached Forms:** None
**Forms Category:** Forms
**Template Repository Visibility:** All Counties
**Languages:** English, Spanish, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

### 2.2.2  Description of Changess

This form has a single impression which consist of specific verbiage provided by the state, and several input fields.

**Form Header:** CalSAWS Standard Header #1

**Form Title (Document List Page Displayed Name):** Good Cause/Exemption Letter

**Template Description:** This form is used as a Notice to Customers that they must participate in the Welfare-To-Work program.

**Form Number:** WTW 100

**Include NA Back 9:** No

**Imaging Form Name:** Good Cause/Exemption Letter

**Imaging Document Type:** Welfare to Work (WTW)

#### 2.2.2.1  Variable Population for WTW 100 Form

WTW 100 Form will populate the following information when generated from Customer Appointment Detail page. CalSAWS Standard Header will be populated with Customer and Worker Information.

All the text fields and checkbox fields should be editable.

Dear <mark><1></mark>_____,

Our records show that your reason for not doing Welfare-to-Work activities based on:
_____

will end on _____. If the reason you have not been doing Welfare-to-Work activities no longer exist, you will need to
     (Date)
start doing Welfare-to-Work.

☐ If this box is checked, please call our office by _____ at <mark><2></mark>_____
       (Date)        (Telephone Number)
to talk about whether you need to start doing/performing Welfare-to-Work activities.

<3>
☐ If this box is checked, please come into our office on <mark><4></mark>_____ at <mark><5></mark>_____ to meet with your
      (Date)      (Time)
Welfare-to-Work Case Manager, <mark><6></mark>_____.
Your Case Manager will talk with you about whether you need to start doing Welfare-to-Work activities and what the next steps will be. Contact your worker if you need to change this meeting time.

**Figure 2.1.2.1 – Form WTW 100 body**

| SECTION | FILED | DESCRIPTION | EDITABLE |
|---------|-------|-------------|----------|
| **<1>** | Customer Name | Inherited from standard header population | Y |
| **<2>** | Staff Phone | Inherited from standard header population | Y |
| **<3>** | Checkbox 2 | Select the Checkbox when generated from Customer Appointment Detail Page | Y |
| **<4>** | Appointment Date | Populate with the appointment date from the Customer Appointment Detail Page | Y |
| **<5>** | Appointment Time | Populate with the appointment time from the Customer Appointment Detail Page | Y |
| **<6>** | Staff Name | Inherited from standard header population | Y |

### 2.2.2.2 Form Generation Conditions

Add the Online trigger via Customer Appointment Detail page and the Print Appointment Letter is checked off  to generate WTW 100 for all 58 counties. The form will be triggered for Appointment Category of WTW/REP and for the Appointment type of Good Cause/Exemption.

**Note:** WTW 100 will be generated instead of the GEN 102 when the Print Appointment Letter check box  is checked when the Category is WTW/REP and the Appointment-Type is Good Cause/Exemption.

### 2.2.2.3 Form Controls

Add the following barcode options to the WTW 100 when generated through the Customer Appointment Detail page.

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|:---:|:---:|:---:|
| N | N | Y |

## 2.2.2.4 WTW 100 Form Print Options and Mailing Requirements

Add the following print options to the WTW 100 from when it is generated through the Customer Appointment Detail page.

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|:---:|:---:|:---:|:---:|:---:|:---:|
| Y | Y | Y | Y | Y | Y |

**Mailing Requirements:**

Following are the mailing requirements for WTW 100 form when generated through the Customer Appointment Detail Page.

| Mailing Options | Option for WTW 100 Form |
|:---:|:---:|
| Mail-To (Recipient) | Participant selected on the Customer Appointment Detail Page |
| Mailed From (Return) | Worker's Office Address |
| Mail-back-to Address | N/A |
| Outgoing Envelope Type | Standard |
| Return Envelope Type | N/A |
| Special Paper Stock | N/A |

**Additional Requirement:**

| Requirement | Option for WTW 100 Form |
|:---:|:---:|
| Post to Self-Service Portal | Y |

Design

# CA-259395

Re-design CF 377.1 CalFresh Approval NOAs

# CalSAWS

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| | Prepared By | Brendan Mandyam | |
| | Reviewed By | Tiffany Huckabee | |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 2/5/2025 | 1.0 | Initial Design | Brendan Mandyam |
| 2/26/2025 | 1.1 | Revised Design | Brendan Mandyam |
| | | | |

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# CA-295395 - Re-design CF 377.1 CalFresh Approval NOAs

## 1 OVERVIEW

This SCR will redesign the CF 377.1 to include verbiage informing the household of members not approved for CalFresh Benefits, as well as focus on ensuring variable population is populating as expected.

### 1.1 Current Design

Currently, pro-rated/expedited scenarios currently populate the first amount with authorized amount from EDBC and then checks if it was a multi-month run. Once it finds EDBC data for the upcoming month it validates that it is not zero and then uses the benefit month value and sets the second amount. If it is not zero then it uses the benefit amount allotted in the first EDBC. If the upcoming EDBC is discontinued and the amount is $0 it uses benefit amount of the initial EDBC. The CalFresh Recertification NOA currently lists the full benefit amount.

### 1.2 Requests

Variable population is not currently correct for different scenarios. This SCR needs to validate the variables that are generating on the NOA, such as the authorized amount, full benefit amount, and prorated amount.

Redesign CF 377.1 Approval Notice and add verbiage informing the household of members not approved for CalFresh Benefits.

### 1.3 Overview of Recommendations

1   Update the Denial Reasons that generate on the CF 377.1 (8/24) Mixed Approval Notice
2   Update the CF 377.1(8/24) Action Verbiage with a list of approved Individuals and ensure Variable Population is populating as expected.
3   Stop Generating the outdated Action verbiage on the CF 377.1 (8/24) Notice.
4   Update IRT statement and CalFresh Benefit Details on the CF 377.1 (8/24) Notice.
5   Remove CalFresh Household Size verbiage on the CF 377.1 (8/24)
6   Update the CF 377.1(8/24) Form in the Template Repository

### 1.4 Assumptions

1.  The Non-Discrimination Statement is being added to the CalFresh NOA template with SCR CA-265360

2. The CalFresh Budget and Explanation of the Two Food Benefit Programs is being added to the CalFresh NOA template with SCR CA-265360.
3. The Checkboxes as displayed in the ACL 23-79 will not be generated on the Automated NOAs, rather each section will generate dynamically as applicable.
4. The reason Fragments listed in the Mixed Approval Denial Reasons are for when a member of the household was not approved for CalFresh.
5. During a partial approval scenario, if an individual is ineligible for CalFresh for multiple reasons, all those reasons will generate on the CF 377.1 (8/24) Notice.
6. The Standard NA Back 9 will be included on the back page of all automated Notices.
7. The IRT statement will be added to the CF 377.1 as part of this effort, see recommendation. The IRT statement will be added to the CF 377.4 SAR as part of CA-265360.

# 2 RECOMMENDATIONS

## 2.1 Update the Denial Reasons that generate on the CF 377.1 Mixed Approval Notice

### 2.1.1 Overview

Currently the CF 377.1 Notice will inform the household that the household was approved for CalFresh Benefits and inform the household of any members who were not approved for CalFresh Benefits and the reason why they are not eligible for CalFresh Benefits.

This recommendation will update these Denial Reason Fragments to include state issued verbiage clarifying which members of the household were not approved for CalFresh Benefits. It will also update them to generate with the action fragment CF_AP_ACTION8 instead of CF_AP_ACTION9.

**Reason Fragment/ID:** See Supporting Document #1
**State Form/NOA:** CF 377.1(8/24)
**NOA Template:** CF_NOA_TEMPLATE
**Program(s):** CalFresh
**Action Type(s):** Approval
**Fragment Level:** Program
**Repeatable: N**
**Include NA Back 9:** Y
**Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.1.2 Form/NOA Verbiage

**<u>Create Fragment XDP</u>**

See supporting document #6 for XDP Updates

**NOA Mockups/Examples:** See Supporting Documents #<mark>2,3,4</mark>

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

Technical Note: Not all Reason Fragments currently generate in all the languages listed above. See supporting document #1 for languages by reason. We will not be adding new languages for the Reason Fragments with this effort, only updating fragments in their existing languages.

### 2.1.3 Form/NOA Variable Population

| Variable Name | Population | Formatting* |
|---|---|---|
| <person> | This variable is on all Reason Fragments listed in supporting document #6.<br><br>This variable should be updated to populate with a list of names, separated by comma instead of by line.<br><br>For example: "John Smith, Jane Smith, Jackson Smith" | Arial, Size 10 |

1. **<u>Add Fragment Regulations</u>**
   There will be no updates to Fragment Regulations

2. **<u>Add NOA Title and Footer Reference for new Reason</u>**
   The NOA Footer should be updated to the most recent state version – CF 377.1 (8/24). There will be no other updates to Title and Footer.
   Standard CalFresh Title, Reference, and Footer

   **NOA Reference on Document List Page:** NOA - CF - AP - CF APPROVED
   **NOA Title:** Notice of Approval for CalFresh Benefits
   *NOA Title Requires Translations:* N (Should be translated already)
   **NOA Footer:** CF 377.1 (8/24)
   *NOA Footer Requires Translations:* N

### 2.1.4 Form/NOA Generation Conditions

**<u>Fragment Generation</u>**

The Generation Conditions for these fragments will not be updated as part of this effort.

Note: CA-245049 will update these Reason Fragments to generate on the CF 388 Approval for Reinstatement Notice in addition to the CF 377.1(8/24) Approval for CalFresh Notice. These Reason Fragments will only generate on the CF 388 Notice when a household is applying for Reinstatement, otherwise they will generate on the CF 377.1(8/24) Notice.  If a CF 388 Notice generates, the CF 377.1 Notice should not generate.

**New NOA Template:** No
**New Program Generation:** No
**New Action Type:** No
**Update to Fragment Level:** No
**Repeatable:** No
**New Forms/NOAs Generated with this NOA:** No

| Generation Type | Does this NOA reason currently generate prior to this effort? | Is this generation type being updated with this effort? |
|---|---|---|
| EDBC | Yes | No |
| Negative Action EDBC | No | No |
| Batch | No | No |

**Action Fragment:** These Fragments will generate with the CF_AP_ACTION8 (id: 4077) Action Fragment.

**Message Fragment:** These Fragments will generate with the CF_AP_MESSAGE5 (ID: 5030) Message Fragment.

**Ordering on NOA:** These Fragments will generate after the CF_AP_ACTION8 (id: 4077) Action Fragment.

Technical Note: The CF 377.1 (8/24) Approval for CalFresh Notice will list all Individuals in the household who were not approved for CalFresh Benefits and the reasons for this. Merge logic should ensure these all generate on a single NOA.

## 2.2  Update the CF 377.1 (8/24) Action Verbiage with a list of approved individuals and ensure Variable Population is populating as expected.

### 2.2.1  Overview

This recommendation will update the CF_AP_ACTION8 Action Fragment to include verbiage informing the household of all members who were approved for CalFresh Benefits. This Action Fragment will now generate on all CF 377.1 (8/24) Notices, replacing CF_AP_ACTION9.

This recommendation will also update the Variable Population to ensure the household is being informed of their CalFresh Benefits details as expected.

## YOUR APPLICATION FOR CALFRESH BENEFITS HAS BEEN APPROVED.

Your initial amount of benefits is: <BenefitAmount> for <Month1>. Your benefit amount for the rest of your certification period will be <fullBenefitAmount> from <SecondMonthOfCertification> through <CertificationEndDate> for the following individual(s): <AP_PERSON_LIST>

**Action Fragment/ID:** CF_AP_ACTION8 (id: 4077)
**State Form/NOA:** CF 377.1(8/24)
**NOA Template:** CF_NOA_TEMPLATE
**Program(s):** CalFresh
**Action Type(s):** Approval
**Fragment Level:** Program
**Repeatable: N**
**Include NA Back 9:** Y
**Languages:** English, Spanish

### 2.2.2 Form/NOA Verbiage

**Create Fragment XDP**

There will be no updates to Fragment Verbiage.

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

**NOA Mockups/Examples:** See Supporting Documents #2,3, & 4

| Description | Previous Text | Updated Text | Formatting |
|---|---|---|---|
| static | YOUR APPLICATION FOR CALFRESH BENEFITS HAS BEEN APPROVED. | YOUR APPLICATION FOR CALFRESH BENEFITS HAS BEEN APPROVED. | Static, Arial Size 10 |

| | Your initial amount of benefits is: <BenefitAmount> for <Month1>. Your benefit amount for the rest of your certification period will be <SecondMonthBenefitAmount> from <CertificationBeginDate> through <CertificationEndDate>. | Your initial amount of benefits is: <BenefitAmount> for <Month1>. Your benefit amount for the rest of your certification period will be <fullbenefitamount> from <SecondMonthOfCertification> through <CertificationEndDate> for the following individuals: <AP_LIST> | |

### 2.2.3 Form/NOA Variable Population

#### 3. <u>Add Fragment Variable Population</u>

The Variable Population for this fragment will be the same as the variable population for the old version of CF_AP_ACTION8

| Variable Name | Population | Formatting* |
|---|---|---|
| BenefitAmount | The Benefit amount to be paid out for the first month of CalFresh benefits.<br>This would be prorated if approval was not on the first day of the month.<br><br>See edbc.authorized_amount for the current month | Arial, Size 10 |
| Month1 | The EDBC Benefit Month<br><br>MM/YYYY<br><br>For example, if benefits were approved on 01/01/2025 this field would be:<br>"01/2025" | Arial, Size 10 |
| Full_benefit_amount | The CalFresh authorized amount to be paid out monthly during the period below.<br><br>If next months authorized amount is available, populate with ebc.authorized_amount for the month after the EDBC was ran. | Arial, Size 10 |

| | | Technical Note: If next months authorized amount is not available, then populate with current months edbc.full_benefit_amount | |
|---|---|---|---|
| SecondMonthOfCertification | | The first day of the second month in the certification period.<br><br>MM/DD/YYYY<br><br>For example, if benefits were approved on 01/01/2025 this field would be:<br><br>02/01/2025<br><br><br>See edbc next benefit month begin date | Arial, Size 10 |
| CertificationEndDate | | Last day of the RE Due month.<br><br>MM/DD/YYYY<br><br>For example:<br>12/31/2025<br><br>See re_due month in program summary. | Arial, Size 10 |
| AP_PERSON_LIST | | List of members of the household who were approved for CalFresh Benefits.<br><br>For Example: "John Smith, Jane Smith, Jackson Smith"<br><br><br>Technical Note: Names should be separated by a comma, not a line | Arial, Size 10 |

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

**Variables Requiring Translations:** None

### 2.2.4 Form/NOA Generation Conditions

This Fragment will be used on all CF 377.1 (8/24) Notices moving forward.

High Level: This Fragment will generate on all CF 377.1 (8/24) Notices. The CF 377.1 (8/24) will either generate as a Mixed Approval or a Full Approval.

Mixed Approval Scenario:
If the household was approved for CalFresh, but members of the household are ineligible for Reinstatement, this Action Fragment will generate with any of the Reason Fragments listed in recommendation 2.1

Full Approval Scenario:
In the case that all household members are approved for CalFresh Benefits, this Action Fragment will generate with any reason fragments that are currently used for Full Approvals.

1. In the previous EDBC, the household was not eligible for CalFresh

   Technical Note:
   There is not a previously existing EDBC for CalFresh
   or
   there is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the household was not eligible for CalFresh
   or
   there is not a previously existing CalFresh EDBC for the current Benefit month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the household was not eligible for CalFresh.

2. In the Current EDBC, the household became Eligible for CalFresh.

Note: If the CalFresh was discontinued for RE reasons, and the CFHH was eligible after the user rescinds the CF, the CF 377.1 would generate.

**Ordering on NOA:** This will always generate first on the Notice.

## 2.3  Stop Generating the outdated Action verbiage on the CF 377.1 (8/24) Notice.

### 2.3.1  Overview

This action fragment contains dynamic verbiage that will be moved into the CalFresh Approval Message Fragment CF_AP_MESSAGE5 (ID: 5030). Therefore, this action fragment will no longer generate on the CF 377.1 (8/24). Instead, the

Action Fragment CF_AP_ACTION8 (id: 4077) will generate on all CF 377.1 (8/24) Notices.

**Action Fragment Name and ID:** CF_AP_ACTION9 (ID: 4161)
**State Form/NOA:** CF 377.1 (8/24)
**Current Program(s):** CalFresh
**Current Action Type:** Approval
**Current Fragment Level:** Program
**Currently Repeatable:** No
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.3.2 Form/NOA Verbiage

**<u>Update Fragment XDP</u>**

There will be no updates to Fragment XDP.

### 2.3.3 Form/NOA Variable Population

There will be no updates to Fragment Variable Population

### 2.3.4 Form/NOA Generation Conditions

**<u>Updates to Fragment Generation</u>**

This action fragment will no longer generate on the CF 377.1 (8/24) Notice.

This action fragment will no longer generate with the reasons listed in supporting document #7.

**New Program Generation:** N
**New Action Type:** N
**Update to Fragment Level:** N
**Repeatable:** N

## 2.4 Update IRT statement and CalFresh Benefit Details on the CF 377.1 (8/24) Notice.

### 2.4.1 Overview

This Recommendation will move the dynamic verbiage that was previously in the Action Fragment CF_AP_ACTION9 (id:4161) into the Message Fragment CF_AP_MESSAGE5 (ID: 5030) to support the new verbiage being added with this effort informing the household of members

who were not approved for CalFresh. This message will also generate on all CF 377.1 (8/24) Notices.

- ☐ Your CalFresh eligibility starts the same day as your cash aid.

- ☐ Your first month's benefits include more than one month's benefits because of the date your application was approved.

- ☐ Your first month's benefits were prorated from the date you filed your application.

**IF YOU ALSO APPLIED FOR CASH AID**, and it has not yet been approved, your CalFresh benefits may be lowered or stopped without another notice if your cash aid is approved.

You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $ _____.

---

☐ **BECAUSE YOU RECEIVED CALFRESH BENEFITS RIGHT AWAY,** we did not require you to give us the following verification:



You must give us this verification before _____ or your CalFresh eligibility will stop. You will not get another notice. If the verification you send changes your eligibility or benefits, we will make the change. You **will not** get an advance notice before we take this action.

**Action Fragment Name and ID:** CF_AP_MESSAGE5 (ID: 5030)
**State Form/NOA:** CF 377.1 (8/24)
**Current Program(s):** CalFresh
**Current Action Type:** Approval
**Current Fragment Level:** Program
**Currently Repeatable:** N
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

## 2.4.2  Form/NOA Verbiage

| Description | Existing Text | Updated Text | Format |
|---|---|---|---|
| Dynamic_1 | | Your CalFresh eligibility starts the same day as your cash aid. | Arial, Size 10 |
| Dynamic_2 | | Your first month's benefits include more than one month's benefits because of the date your application was approved. | Arial, Size 10 |
| Dynamic_3 | | Your first month's benefits were prorated from the date you filed your application. | Arial, Size 10 |
| static | | IF YOU ALSO APPLIED FOR CASH AID, and it has not yet been approved, your CalFresh benefits may be lowered or stopped | Arial, Size 10 |

| | | without another notice if your cash aid is approved. | |
|---|---|---|---|
| static | | You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $ <CurrentIrtLimit>. | Arial, Size 10 |
| Dynamic_4 | | **BECAUSE YOU RECEIVED CALFRESH BENEFITS RIGHT AWAY,** we did not require you to give us the following verification: <verifications>

You must give us this verification before <verif_date> or your CalFresh eligibility will stop.  You will not get another notice.  If the verification you send changes your eligibility or benefits, we will make the change.  You will not get an advance notice before we take this action. | Arial, Size 10. "**BECAUSE YOU RECEIVED CALFRESH BENEFITS RIGHT AWAY,**" bold, arial size 10 |
| static | Your CalFresh household may be eligible to a State Utility Assistance Subsidy (SUAS) payment. If eligible, the county will award you a $20.01 SUAS cash payment. This is a one-time per year payment and if eligible it will be put into your cash EBT account. If you do not have a cash EBT account, one will be set up for you on your CalFresh EBT card. You will not have to do anything to get a new card, but you can use it to cover expenses not otherwise covered by CalFresh. This payment allows the county to use the highest utility deduction (Standard Utility Allowance - SUA) for food benefits. You may use this $20.01 when you use your EBT card. If you want to know more, please contact your local county office. | Your CalFresh household may be eligible to a State Utility Assistance Subsidy (SUAS) payment. If eligible, the county will award you a $20.01 SUAS cash payment. This is a one-time per year payment and if eligible it will be put into your cash EBT account. If you do not have a cash EBT account, one will be set up for you on your CalFresh EBT card. You will not have to do anything to get a new card, but you can use it to cover expenses not otherwise covered by CalFresh. This payment allows the county to use the highest utility deduction (Standard Utility Allowance - SUA) for food benefits. You may use this $20.01 when you use your EBT card. If you want to know more, please contact your local county office. | Arial, Size 10 |

### 2.4.3 Form/NOA Variable Population

| Name | Population | Format |
|------|-----------|--------|
| CurrentIrtLimit | Populates with the households current IRT limit.<br><br>See edbc.current_irt_limit | Arial, size 10 |
| Verifications | Populates with the predetermined verifications.<br><br>See CF_AP_EXPEDITED_F903 for variable population | Arial, size 10 |
| Verif_date | Populates with the deadline the verifications are required.<br><br>See CF_AP_EXPEDITED_F903 for variable population | Arial, size 10 |

### 2.4.4 Form/NOA Generation Conditions

**Fragment Generation Conditions:**
This fragment will now always generate with the new Reason Fragment being added in recommendation 2.2

**Fragment Section Generation**

| Section | Conditions |
|---------|-----------|
| Dynamic_1 | Should generate when a CW program starts the same day as the expedited CalFresh Program. |
| Dynamic_2 | Should generate when the start date of aid is after the 15<sup>th</sup> day of the month. |
| Dynamic_3 | Should generate when the intake month allotment is prorated. |
| dynamic_4 | Generates when the verifications for CalFresh were previously determined. |

## 2.5 Remove CalFresh Household Size verbiage on the CF 377.1 (8/24)

### 2.5.1 Overview

The CF_AP_MESSAGE8 has the following verbiage "For CalFresh, your family size is {AssistanceUnitSize}." This verbiage has been removed from the CF 377.1.

Therefore, the CF_AP_MESSAGE8 is now redundant. Moving forward the CF_AP_MESSAGE5 will be used as the message fragment for all CF 377.1(8/24) Notices (See recommendation 2.4).

**Action Fragment Name and ID:** CF_AP_MESSAGE8 (ID: 5140)
**State Form/NOA:** CF 377.1 (8/24)
**Current Program(s):** CalFresh
**Current Action Type:** Approval
**Current Fragment Level:** Program
**Currently Repeatable:** <mark>No</mark>
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.5.2  Form/NOA Verbiage

There will be no updates to NOA Verbiage.

### 2.5.3  Form/NOA Variable Population

There will be no updates to Fragment Variable Population

### 2.5.4  Form/NOA Generation Conditions

This Fragment will no longer generate with the any of the action or reason fragments included in supporting document <mark>#8</mark>

## 2.6  Update the CF 377.1 Form in the Template Repository

### 2.6.1  Overview

This recommendation will update the CF 377.1 Form in the Template Repository by bringing the verbiage up to date with the most recent state published version, adding in the CalFresh Budget, Explanation of Two Food Benefit Programs, Non-Discrimination Statement and updating the footer.

**State Form**: CF 377.1 (8/24)
**Current Programs:** CalFresh
**Current Forms Category:** NOA
**Current Template Repository Visibility:** All Counties
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.6.2  Form Verbiage

The verbiage on the CF 377.1 Form in the Template Repository has been rearranged. See Supporting Document #<mark>5</mark> for details.

**Update Form XDP**

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

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

**Form Mockups/Examples:** See Supporting Documents #5

### 2.6.3  Form/NOA Variable Population

See supporting document #9 for updated Variable Population.

### 2.6.4  Form/NOA Generation Conditions

There will be no updates to the Forms Variable Population with this effort.

## 3  SUPPORTING DOCUMENTS

| NUMBER | FUNCTIONAL AREA | DESCRIPTION | ATTACHMENT |
|---|---|---|---|
| 1 | NOAs | List of all CF 377.1 Mixed Approval Denial Reasons (recommendation 2.1) | Mixed Approval Denial Reasons.xlsx |
| 2 | NOA | CF 377.1 Automated Notice Mockup – Multiple Persons denied for one Reason. (recommendation 2.1-2.5) | CF 377.1 Multiple Persons Denied for One Reason.pdf |
| 3 | NOA | CF 377.1 Automated Notice Mockup – Multiple Persons denied for multiple Reasons. (recommendation 2.1-2.5) | CF 377.1 Multiple Persons Denied for Multiple Reasons.pdf |
| 4 | NOA | CF 377.1 (8/24) Notice Mockup – Full Approval. (recommendation 2.1-2.5) | CF 377.1 Full Approval No Missing verifications.pdf |
| 5 | Forms | Mockup of the updated CF 377.1 (8/24) Form in the Template Repository (recommendation 2.6) | CF377.1 FORM.pdf |
| 6 | NOA | Contains the updated verbiage for the CF 377.1 Mixed Approval Reason Fragments. (recommendation 2.1) | CF 377.1 Updated Reason Verbiage.xlsx |
| 7 | NOA | Outdated Action Verbiage (recommendation 2.3) | Outdated Action Fragment.xlsx |

| NUMBER | FUNCTIONAL AREA | DESCRIPTION | ATTACHMENT |
|---|---|---|---|
| | | Technical Note: Contains Reason Fragments the action currently generates with. | |
| 8 | NOAs | Contains Outdated Household Size verbiage and its corresponding Reasons. (see recommendation 2.5) <br><br> Technical Note: Contains the reasons and actions that generate with the outdated message. | CF377.1 Outdated Message Fragment.xlsx |
| 9 | Form | Update Variable Population for the CF 377.1 (8/24) Form in the Template Repository (see recommendation 2.6) | CF377.1 Update Variable Population.xlsx |

CalSAWS

California Statewide Automated Welfare System

Design

**CA-265360**

ACL 23-79 Add IRT and Budget to CF 377.1, CF 377.1A, and CF 377.4 SAR

| CalSAWS | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| | Prepared By | Brendan Mandyam | |
| | Reviewed By | Tiffany Huckabee | |
| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
| 2/5/2025 | 1.0 | Initial Design | Brendan Mandyam |
| 2/26/2025 | 1.1 | Revised initial Design | Brendan Mandyam |
| | | | |

# Table of Contents

# CA-265360 – ACL 23-79 Add IRT and Budget to CF 377.1, CF 377.1 A, and CF 377.4 SAR

## 1 OVERVIEW

CF 377.1, CF377.1A, and CF 377.4 SAR are being updated to include a CalFresh budget, IRT amount, and breakdown of eligible and ineligible individuals with the corresponding reason for their ineligibility. These are also being revised to support the upcoming CFAP Expansion on October 1, 2025.

### 1.1 Current Design

CDSS published CF 377.1, CF 377.1 A, and CF377.4 SAR do not include an abbreviated CalFresh budget, household IRT amount, or breakdown of eligible and ineligible individuals with the corresponding reason for their ineligibility.

### 1.2 Requests

Update CalFresh NOAs and Forms to the latest CDSS version which include the new verbiage and budget:
- CF 377.1A
- CF 377.1
- CF 377.4

Note: This impacts Template Repository and NOAs generated from EDBC.

### 1.3 Overview of Recommendations

1. Add the CalFresh Budget and Explanation of the Two Food Benefit Programs to the CalFresh NOA Templates
2. Add the Non-Discrimination statement to the CalFresh Notice Templates
3. Add a new Message Fragment with the updated IRT verbiage to the CF 377.4 SAR
4. Update existing CF 377.4 SAR Message Fragments to include the most recent state published IRT Reporting verbiage.
5. Add the Updated CF 377.4 SAR as a form to the template Repository
6. Add the Updated CF 377.1A as a form to the Template Repository
7. Add the Updated CF 377.1 As a form to the Template Repository

### 1.4 Assumptions

1. CFAP effort is being pushed back 2 years so we will not be implementing the new Denial Reason as Requested
2. The CalFresh Budget and Non-Discrimination Statement will be added as part of the CalFresh Notice Templates.

3. The IRT message will be added to the CF 377.1 Automated Notice as part of CA-259395. It will be added to the CF 377.1 Form in the Template Repository as part of this effort.
4. CF 377.1A does not include an IRT statement, as shown in ACL 23-79.
5. The New CalFresh Budget being added to the CalFresh NOA Templates will replace the old CalFresh budget (BUDGET_CF_APPROVAL_SAR_EN.xdp).
6. The Standard NA back 9 will be included on the back page of all Automated Notices.

## 2 RECOMMENDATIONS

### 2.1 Update NOA template to include the CalFresh Budget and Explanation of Two Food Benefit Program

#### 2.1.1 Overview

This Recommendation will update all the CalFresh NOA template to include the CalFresh Budget and explanation of the Two Food Benefit Programs. As of now this will only generate on CF 377.1, CF 377.1A, and CF 377.4 SAR.

**State Form/NOA:** CF_NOA_TEMPLATE
**Current Program(s):** CalFresh
**Include NA Back 9:** Y
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

#### 2.1.2 Form/NOA Verbiage

**Update Fragment XDP**
This Recommendation will update the NOA template to include the CalFresh Budget and explanation of the Two Food Benefit Programs. This will be added as an entire page to the CalFresh Template.

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

**NOA Mockups/Examples:** See Supporting Documents #1,3, 11

| Description | Text | Formatting* |
|---|---|---|
| static | **CALFRESH BUDGET** | Bold, Arial Size 10 |
| static | Report Month <MONTH_1> <br> Household Size <HOUSEHOLD_SIZE> | Arial Size 10 |

| | | | |
|---|---|---|---|
| | | Total Countable Earned Income $<TOTAL_CTBL_EARNED_INCOME><br>Adjusted Countable Earned Income $ <ADJSTD_CTBL_EARNED_INCOME><br>Total Unearned Income $ <TOTAL_CTBL_UNEARNED_INCOME><br>Child Support Paid $<CHILD_SUPPORT_PAID><br>Net Countable Income $ <NET_COUNTABLE_INCOME><br><br>Standard Deduction $<STANDARD_DEDUCTION><br>Dependent Care $<DEPENDENT_CARE><br>Homeless Shelter Deduction $ <HOMELESS_SHELTER_DEDUCTION><br>Excess Medical Expense for Aged/Disabled $ <EXCESS_MEDICAL_EXPENSE><br>Total Deductions $ <TOTAL_DEDUCTIONS><br><br>Preliminary Adjusted Income $ <PRELIMINARY_ADJUSTED_INCOME><br>Housing Expenses $ <HOUSING_EXPENSES><br>Utility Expenses $ <UTILITY_ALLOWANCE><br>Allowable Shelter Deduction $ <ALLOWABLE_SHELTER_DEDUCTION><br>Adjusted Net Income $ <ADJSTD_NONEXEMPT_INCOME><br><br>CalFresh Allotment $ <CALFRESH_ALLOTMENT ><br>CFAP Allotment $ <CFAP_ALLOTMENT><br>Less Overissuance $ <LESS_OVERISSUANCE><br>Total CalFresh Allotment $<TOTAL_CALFRESH_ALLOTMENT> | |
| static | | **California offers two food benefit programs.** | Bold, underlined, Arial Size 10 |
| static | | *CalFresh is California's name for the federally funded Supplemental Nutrition Assistance Program (SNAP). To receive CalFresh benefits, you must meet federal rules, which require United States citizenship or certain immigration statuses (7 CFR 273.2(f) (1)(ii)(A) and MPP 63-403). CalFresh benefits appear in the budget as "CalFresh Allotment".*<br><br>*The California Food Assistance Program (CFAP) provides state-funded food benefits to some immigrants who are not eligible for federal food benefits. If immigration status is the only reason, you or someone in your household is not eligible for CalFresh, then you may be eligible* | Arial Size 10, italicized |

| | *for CFAP. CFAP benefits appear in the budget as "CFAP Allotment-".* | |
|---|---|---|

**Updated Template Layout:** The CalFresh Budget and Two Food Program explanation will be added as a full page to the CalFresh NOA Templates, after the normal fragment population but proceeding the new NDA being added.

### 2.1.3 Form/NOA Variable Population

#### Add/Update Fragment Variable Population

See supporting document #2 for population details.

See EDBC Screenshots included below for variables populated from EDBC.

## CalFresh EDBC Summary

**\*-** Indicates required fields

| Begin Month | End Month | Run Date |
|---|---|---|
| 04/2023 Report Month | 04/2023 | 04/20/2023 |

| Net Income Eligibility | | Regular |
|---|---|---|
| Unearned Income   Total Countable Unearned Income | $ | 0.00 |
| Earned Income   Total Countable Earned Income | + | 0.00 |
| Deductions   Total Deductions | - | 193.00 |
| Total Adjusted Income   Preliminary Adjusted Income | = | 0.00 |
| | | |
| Excess Shelter Costs | $ | 3,060.00 |
| Maximum Shelter Allowance | $ | 624.00 |
| Allowed Shelter Costs   Allowable Shelter Deduction | $ | 624.00 |
| | | |
| Total Net Nonexempt Income   Adjusted Net Income, Net Countable | = | 0.00 |
| | | |
| Household Size   Household Size | | 3 |
| Maximum Net Income | $ | 1,920.00 |
| Result | | Pass |

| Type | Description | Amount |
|------|-------------|--------|
| Utility Allowance | (04/01/2023) $560.00 (Expense Based SUA) *Utility Expenses* | $ 560.00 |

| Type | Description | Amount |
|------|-------------|--------|
| CalFresh Standard Deduction *Standard Deduction* | | $ 193.00 |
| | Total | $ 193.00 |

| CFAP Allotment | | CFAP Calculation Detail |
|----------------|---|-------------------------|
| Combined Allotment( Federal + CFAP ) | $ | 345.36 |
| Federal Only Allotment *CalFresh Allotment* | - | 240.82 |
| CFAP Allotment | = | 105.00 |

| Allotment | | Regular |
|-----------|---|---------|
| Full Month Allotment | $ | 740.00 |
| Dates to Prorate | | 17-30 |
| Allotment | $ | 345.36 |
| Combined Allotment | $ | 345.36 |
| CFAP Amount *CFAP Allotment* | $ | 105.00 |
| Overridden CFAP Amount | $ | |
| Final Allotment | $ | 345.00 |
| Overridden Allotment | $ | |
| Previous Potential Benefit Allotment | - | 0.00 |
| Overissuance Adjustment Amount | - | 0.00 |
| **Authorized Amount** *Total CalFresh Allotment* | = | **345.00** |

### 2.1.4 Form/NOA Generation Conditions

This page will always generate on the CF 377.1, CF 377.1A, and CF 377.4 SAR Notices when the Budget is available in the EDBC.

**Technical Notes:**
This Page will generate with any of the reason fragments included in supporting document #4.

This Budget should only generate on Denials when a budget is available in the EDBC.

This Budget will be replacing the old CalFresh Budget (BUDGET_CF_APPROVAL_SAR_EN.xdp).

## 2.2 Update the CalFresh NOA Templates to include the new Non-Discrimination Statement

### 2.2.1 Overview

This Recommendation will update the NOA templates to include the new Non-Discrimination Statement as a full page. As of now this will only generate on CF 377.1, CF 377.1A, and CF 377.4 SAR.

**State Form/NOA:** CF_NOA_TEMPLATE, CF_APPROVAL_TEMPLATE, CF_DN_TEMPLATE
**Current Program(s):** CalFresh
**Include NA Back 9:** Y
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.2.2 Form/NOA Verbiage

**Update Fragment XDP**
This Recommendation will update the NOA template to include the CalFresh Budget and explanation of the Two Food Benefit Programs. This will be added as an entire page to the CalFresh Template.

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

**NOA Mockups/Examples:** See Supporting Documents #1

| Description | Text | Formatting* |
|---|---|---|
| static | **NON-DISCRIMINATION STATEMENT** | Bold, Arial Size 10 |
| static | **Non-Discrimination Statement:** In accordance with federal civil rights law and U.S Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), religious creed, disability, age, political beliefs, or reprisal or retaliation for prior civil rights activity. | Arial Size 10 |

| | Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language) should contact the agency (state or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at <FRS PHONE>.<br><br>To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <COMPLAINT FORM 3027> from any USDA office, by calling <ND COMPLAINT PHONE NUMBER>, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to:<br><br>**1. Mail:** < FNS ADDRESS>; or<br><CDSS CRB ADDRESS>; or<br>**2. Fax:** <FAX 1> or <FAX 2>; or<br>**3. E-Mail:** <FNS CRC EMAIL> | |
| static | **This institution is an equal opportunity provider.** | Bold, Arial Size 10 |

**Updated Template Layout:** The Non-Discrimination Statement will be added as a full page to the CalFresh NOA Templates. It will come after the CalFresh Budget and should be the last page of the Notice.

### 2.2.3 Form/NOA Variable Population

**Add/Update Fragment Variable Population**

| Variable Name | Population | Formatting |
|---|---|---|
| COMPLAINT FORM 3027 | Populates with URL: https://www.usda.gov/sites/default/files/documents/ad-3027.pdf | Arial Size 10 |
| FRS PHONE | Populates with phone number: (800) 877-8339 | Arial Size 10 |
| ND COMPLAINT PHONE NUMBER | Populates with phone number: (833) 620-1071 | Arial Size 10 |
| FNS ADDRESS | Populates with the following address: Food and Nutrition Service, USDA 1320 Braddock Place, Room 334 Alexandria, VA 22314; | Arial Size 10 |
| CDSS CRB ADDRESS | Populates with the following address: CDSS Civil Rights Bureau P.O. BOX 944243, M.S. 9-7-041 Sacramento, CA 94244-2430; | Arial Size 10 |
| FAX 1 | Populates with the following fax address: (833) 256-1665 | Arial Size 10 |
| FAX 2 | Populates with the following fax address: (202) 690-7442 | Arial Size 10 |
| FNS CRC EMAIL | Populates with the following email address: FNSCIVILRIGHTSCOMPLAINTS@usda.gov | Arial Size 10 |


Formatted: Not Highlight

### 2.2.4 Form/NOA Generation Conditions

This page will always generate on the CF 377.1, CF 377.1A, and CF 377.4 SAR Notices.

**Technical note:**
This Page will generate with any of the reason fragments included in supporting document #4.

## 2.3 Add a new Message Fragment with the updated IRT verbiage to the CF 377.4 SAR

### 2.3.1 Overview

A New IRT Statement has been added to CF 377.1 and CF 377.4 SAR to inform the household of the IRT Amount. This recommendation will only add the notice to the CF 377.4 SAR.

This fragment will generate with all the reason fragments that currently do not generate a message on the CF 377.4 SAR

**State Form/NOA:** CF 377.4 SAR (8/24)
**Program(s):** CalFresh
**Action Type(s):** All
**Fragment Level:** Program
**Repeatable:** N
**Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.3.2 Form/NOA Verbiage

**Create Fragment XDP**
Fragment will display the Current IRT limit

**NOA Mockups/Examples:** See Supporting Document #1

| Description | Text | Formatting* |
|---|---|---|
| Static | **REQUIRED INCOME REPORTING** | Bold, Arial, Size 10 |
| static | You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Arial, Size 10 |

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

### 2.3.3 Form/NOA Variable Population

**Add Fragment Variable Population**

| Variable Name | Population | Formatting* |
|---|---|---|
| CURRENT_IRT_LIMIT | Populates with the Current IRT limit for the household<br><br>Ex: 1000.00<br><br>See edbc.current_irt_threshold | Arial, Font Size 10 |

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

### 2.3.4 Form/NOA Generation Conditions

1. **Add Fragment Generation**
   This Fragment will generate with the following reasons:
   CF_TN_INELIG_INST_F004 (ID: 6004)
   CF_CH_INELIG_STUD_F017 (ID: 6018)
   CF_TN_FAIL_CMPLY_NHR_F143 (ID: 6075)
   CF_TN_NOT_FED_ELIG_W1YR_F161 (ID: 6079)
   CF_TN_NCOOP_SPNSR_NCTZN_F377 (ID: 6104)
   CF_TN_TFS_FAIL_CLNTRQ_F621 (ID: 6109)
   CF_TN_HH_LEFT_ST_F622 (ID: 6110)

CF_TN_CW_RSCND_AP_F623 (ID: 6111)
CF_TN_RCVNG-AID_DIFF_CNTRY_F626 (ID: 6487)
CF_CH_UVISA_DENIED_F153 (ID: 7208)
CF_CH_TVISA_NOT_APPLY_WITHIN_YEAR_F160 (ID: 7214)
CF_TN_TVISA_TERMINATION_F152 (ID: 7236)
CF_TN_UVISA_DENIED_F153 (ID: 7237)
CF_TN_TVISA_NOT_APPLY_WITHIN_YEAR_F160 (ID: 7238)
CF_CH_CHANGE_REPORT_HH_NO_CHANGE_F386 (ID: 7242)
CF_CH_NEW_COLA_BENEFIT_AMT (ID: 7480)
CF_DN_TN_ZERO_ALLOTMENT_F718 (ID: 7618)
CF_TN_NEW_LOTTERY_GAMBLING_WINNINGS_F419 (ID: 7838)
CF_CH_IPV_RECOUPED_F719 (ID: 10999)

**Ordering on NOA:** the last fragment preceding the CalFresh Budget

## 2.4 Update existing CalFresh CF 377.4 SAR Message Fragments to include the most recent state published IRT Reporting verbiage.

### 2.4.1 Overview

The following Message Fragments currently generate on the CF 377.4 SAR:
CF_CH_MESSAGE2 (ID: 5005)
CF_TN_MESSAGE4 (ID: 5016)
CF_CH_MESSAGE4 (ID: 5007)
CF_TN_MESSAGE2 (ID: 5012)
CF_TN_MESSAGE1 (ID: 5011)
CF_TN_MESSAGE5 (ID: 5015)
CF_CH_MESSAGE3 (ID: 5006)
CF_CH_MESSAGE7 (ID: 5029)

These Fragments will be updated with the most recent state published IRT Verbiage

**State Form/NOA:** CF 377.4 SAR
**Program(s):** CalFresh
**Action Type(s):** Recertification, Change, Proposed Change, Termination
**Fragment Level:** Program
**Repeatable:** N
**Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.4.2 Form/NOA Verbiage

**Update Fragment XDP**

**NOA Mockups/Examples:** See Supporting Document #1

| Message fragment ID | Existing Text | Updated Text | Formatting* |
|---|---|---|---|
| CF_CH_MESSAGE2 (ID: 5005) | Your CalFresh household size is <HouseholdSize> . Your IRT is <CurrentIrtLimit> . | Your CalFresh household size is <HouseholdSize> . **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |
| CF_TN_MESSAGE4 (ID: 5016) | EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s). | EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s). **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |
| CF_CH_MESSAGE4 (ID: 5007) | Your new CalFresh amount is figured on this notice. Your CalFresh household size is <HouseholdSize>. Your IRT is <CurrentIrtLimit>. EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s). | Your new CalFresh amount is figured on this notice. Your CalFresh household size is <HouseholdSize>. EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s). **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |
| CF_TN_MESSAGE2 (ID: 5012) | Your Household's income is figured on this notice. | Your Household's income is figured on this notice. **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |

| | | | |
|---|---|---|---|
| CF_TN_MESSAGE1 (ID: 5011) | EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s). | EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Medi-Cal: This Notice of Action does not change or stop Medi-Cal benefits. If there is any change in your Medi-Cal benefits, you will receive another Notice of Action. Keep your plastic Benefits Identification Card(s). **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |
| CF_TN_MESSAGE5 (ID: 5015) | EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits. | EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits. **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |
| CF_CH_MESSAGE3 (ID: 5006) | Your new CalFresh amount is figured on this notice. Your CalFresh household size is <HouseholdSize>. Your IRT is <CurrentIrtLimit>. EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. | Your new CalFresh amount is figured on this notice. Your CalFresh household size is <HouseholdSize>. EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefits Transfer (EBT), even if your aid is terminated. Please do not throw it away. **REQUIRED INCOME REPORTING** You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | Static, Arial, Size 10 |
| CF_CH_MESSAGE7 (ID: 5029) | Reporting: Households that are receiving transitional CalFresh benefits do not have to report on their income or household situation each month during their transitional CalFresh certification period. However, if you reapply for | Reporting: Households that are receiving transitional CalFresh benefits do not have to report on their income or household situation each month during their transitional CalFresh certification period. However, if you reapply for regular CalFresh benefits and you are | Static, Arial, Size 10 |

| | regular CalFresh benefits and you are approved, your transitional benefits will end and regular reporting requirements will apply.<br><br>If you reapply for CalWORKs and you are approved, you will no longer receive transitional CalFresh benefits even if your 5 months have not ended. | approved, your transitional benefits will end and regular reporting requirements will apply.<br><br>If you reapply for CalWORKs and you are approved, you will no longer receive transitional CalFresh benefits even if your 5 months have not ended.<br>**REQUIRED INCOME REPORTING**<br>You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is $<CURRENT_IRT_LIMIT>. | |

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

### 2.4.3 Form/NOA Variable Population

**Add Fragment Variable Population**

| Variable Name | Population | Formatting* |
|---|---|---|
| CURRENT_IRT_LIMIT | Populates with the Current IRT limit for the <mark>household</mark><br><br>Ex: 1000.00<br><br>See edbc.current_irt_threshold | Arial, Font Size 10 |

Variables requiring translation: None

### 2.4.4 Form/NOA Generation Conditions

This effort will not make any updates to any of the NOA messages generation conditions.

## 2.5 Update the CF 377.4 SAR Form in the Template Repository

### 2.5.1 Overview

This recommendation will update the CF 377.4 SAR in the Template Repository by adding the CalFresh Budget, the explanation of the two Food Benefit Programs, and the new Non-Discrimination Statement.

**State Form**: CF 377.4 SAR (8/24)
**Current Programs:** CalFresh
**Current Forms Category:** NOA
**Current Template Repository Visibility:** All Counties

**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese, Thai, Ukrainian, Vietnamese, Punjabi, Hindi

### 2.5.2 Form Verbiage

The CalFresh Budget, explanation of the two Food Benefit Programs, and the Non-Discrimination statement will be added to the form.

**Update Form XDP**

**Updated Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese, Thai, Ukrainian, Vietnamese, Punjabi, Hindi

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

**Form Mockups/Examples:** See Supporting Documents #5

### 2.5.3 Form/NOA Variable Population

See supporting document #6 for variable population.

### 2.5.4 Form/NOA Generation Conditions

There will be no updates to the Forms Variable Population with this effort.

## 2.6 Update the CF 377.1A Form in the Template Repository

### 2.6.1 Overview

This recommendation will update the CF 377.1A in the Template Repository by adding the CalFresh Budget, the explanation of the two Food Benefit Programs, and the new Non-Discrimination Statement.

**State Form**: CF 377.1A (8/24)
**Current Programs:** CalFresh
**Current Forms Category:** NOA
**Current Template Repository Visibility:** All Counties
**Existing Languages:** English, Spanish

### 2.6.2 Form/NOA Verbiage

The CalFresh Budget, explanation of the two Food Benefit Programs, and the Non-Discrimination statement will be added to the form.

**Update Form XDP**

**Updated Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese, Thai, Ukrainian, Vietnamese, Punjabi, Hindi

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

**Form Mockups/Examples:** See Supporting Documents #7

### 2.6.3  Form/NOA Variable Population

See Supporting document #8 for CF 377.1A Form Variable Population

### 2.6.4  Form/NOA Generation Conditions

There will be no updates to CF 377.1A Form Generation Conditions.

## 2.7  Update the CF 377.1 Form in the Template Repository

### 2.7.1  Overview

This recommendation will update the CF 377.1 in the Template Repository by adding the CalFresh Budget, the explanation of the two Food Benefit Programs, and the new Non-Discrimination Statement. The IRT statement and all other changes to the CF 377.1 will be done as part of CA-259395

**State Form**: CF 377.1 (8/24)
**Current Programs:** CalFresh
**Current Forms Category:** NOA
**Current Template Repository Visibility:** All Counties
**Existing Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese

### 2.7.2  Form Verbiage

The CalFresh Budget, explanation of the two Food Benefit Programs, and the Non-Discrimination statement will be added to the form.

**Update Form XDP**

**Updated Languages:** English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese, Thai, Ukrainian, Vietnamese, Punjabi, Hindi
**Include NA Back 9:** Y
o  **Includes standard NA Back 9 variable population:** Y

**Form Mockups/Examples:** See Supporting Documents #9

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | NOAS | Mockup of the updated CF 377.4 SAR with CalFresh Budget, Explanation of 2 food Benefit Programs, and NonDiscrimination Statement.<br><br>Note: These 3 fragments will appear the same on the CF 377.1, CF 377.1A, and CF 377.4 SAR. | CF_377_4_SAR_NOTICE.pdf |
| 2 | NOAS | Contains all variable population for the CalFreshBudget | Calfresh budget variable population.xlsx |
| 3 | NOAS | Mockup of the automated CF 377.1A Notice | CF377_1A_Notice.pdf |
| 4 | NOAS | Contains all the reason fragments which generate on the CF 377.1, CF 377.1A, and CF 377.4 SAR | All_Applicable_Reason_Fragments.xlsx |
| 5 | FORMs | Mockup of the CF 377.4 SAR Form to be updated in the Template Repository | CF_377_4_SAR_FORM_MOCKUP.pdf |
| 6 | FORMs | Variable population for the new Variables added to the CF 377.4SAR in the Template Repository | CF377.4SAR_FORM_Variable_Population.xlsx |
| 7 | FORMs | Mockup of the CF 377.4 SAR Form to be updated in the Template Repository | CF_377_1A_FORM_MOCKUP.pdf |
| 8 | FORMs | Variable population for the new Variables added to the | CF377.1A_FORM_Variable_Population.xlsx |

| Number | Functional Area | Description | Attachment |
|--------|-----------------|-------------|------------|
| | | CF 377.4SAR in the Template Repository | |
| 9 | FORMs | Mockup of the CF 377.1 Form in the template repository | CF377.1_FORM_MOCKUP.pdf |
| 10 | FORMs | Variable population for the new Variables added to the CF 377.1 in the Template Repository. This just includes the budget and nondiscrimination variable population, all other updates will be made in CA-259395 | CF377.1_FORM_Variable_Population.xlsx |
| 11 | NOA | Mockup of the CF 377.1 Notice.<br><br>Note: This includes variable population to be made in CA-259395. | CF_377.1_NOTICE.pdf |

# CalSAWS

California Statewide Automated Welfare System

Design

# CA-221281
Update the SSP 18 form to the latest update (3/24)

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| **CalSAWS** | Prepared By | Ramon Villarreal-Leal | |
| | Reviewed By | | |
| **DATE** | **VERSION** | **REVISION DESCRIPTION** | **AUTHOR** |
| 1/15/25 | 1.0 | Initial Draft | Ramon Villarreal-Leal |
| 03/06/25 | 2.0 | Updated design as per CRFI responses | Ramon Villarreal-Leal |
| | | | |

# Table of Contents

# CA-275591 – Update the SSP 18 form to the latest update (3/24)

## 1   OVERVIEW

Form SSP 18 needs to be updated to the latest updated version (3/24)

### 1.1   Current Design

Currently the SSP 18 is the 4/15 version in CalSAWS. It is available in the template repository and can be generated via a "Generate SSP 18" button from the IAR Detail page. Agency field on the form only populates for Los Angeles County.

### 1.2   Requests

1. Update the SSP 18 form to the (3/24) version.
2. Update SSP 18 form to populate the Agency field for other counties.

### 1.3   Overview of Recommendations

1. Update the SSP 18 form to the latest version of 3/24 in the following languages: English, Armenian, Chinese, and Spanish.
2. Add Agency field population for other counties.

### 1.4   Assumptions

1. Existing functionality of this form is not being changed.
2. CRFI 25-006 requested from the counties their wish to have inserted on the SSP 18 form in the Agency field.  For consortium counties, Agency field will be populated with San Mateo and Sacramento agency name.  Counties that did not respond to the request will have their CAPI County Office name populated. Any changes or counties wanting to provide a CAPI agency name will be addressed in a future SCR.

# 2 RECOMMENDATIONS

## 2.1 Update the SSP 18 form to the latest update (3/24)

### 2.1.1 Overview

This effort is to update the SSP 18 form to the latest version (3/24).

**State Form:** SSP 18 Notice of Action and Right to Request a State Hearing on Interim Assistance (3/24)
**Current Programs:** General Assistance, CAPI
**Current Attached Forms:** None
**Current Forms Category:** Forms
**Current Template Repository Visibility:** All Counties
**Existing Languages:** English, Armenian, Chinese Spanish

### 2.1.2 Form/NOA Verbiage

**Update SSP 18 Form XDP**
**Updated Languages:** English, Armenian, Chinese, Spanish

**Form Mockups/Examples:** See Supporting Documents #1

**NA BACK 9 included:** Yes

### 2.1.3 Variable Population Logic

The SSP 18 will have the following variable population logic updates:

| VARIABLE NAME | POPULATION | FORMAT | FIELD TYPE* / EDITABLE | POPULATES WITH TEMPLATE REPOSITORY | POPULATES WITH FORM GENERATION |
|---|---|---|---|---|---|
| AGENCY | Populates with the CAPI Counties Agency names as listed on supporting document #2. Only the counties with an agency name listed in the | Arial Font Size 10 | Text field* / Yes | Yes | No |

| VARIABLE NAME | POPULATION | FORMAT | FIELD TYPE* / EDITABLE | POPULATES WITH TEMPLATE REPOSITORY | POPULATES WITH FORM GENERATION |
|---|---|---|---|---|---|
|  | supporting document will have variable population logic. If a county does not have an agency name listed, then the field will be blank. |  |  |  |  |

### 2.1.4  Form/NOA Generation Conditions

No changes to this section.

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1. | Forms | English form SSP 18 | SSP18_EN.pdf |
| 2. | Spreadsheet | List of CAPI County Agency Names | Supporting Document 2 - CAPI Counties Agency Name.xlsx |
| | | | |

# 4 APPENDIX

1. **Form Print/Mailing Options for SSP 18**

| 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:**
**Mail-To (Recipient):** Customer name selected from dropdown in the document parameters page.
**Mailed From (Return):** Sending Office
**Mail-back-to Address:** None
**Outgoing Envelope Type:** Standard mail
**Return Envelope Type:** None

**Additional Options:**
**Special Paper Stock:** No
**Enclosures:** None
**Electronic Signature:** No
    **Electronic Signature (IVR/Text):** No
    **Check to Sign:** No
**Post to Self Service Portal (SSP):** Yes

**Note:** These are the existing print and mailing options for the SSP 18, and will not be changed with this SCR.

# CalSAWS

California Statewide Automated Welfare System



## CA-276199

## Verification of Benefits - for all programs

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| **CalSAWS** | Prepared By | Nithin Halesh | |
| | Reviewed By | | |
| **DATE** | **VERSION** | **REVISION DESCRIPTION** | **AUTHOR** |
| 12/27/2024 | 1.0 | Initial Draft | Nithin Halesh |
| | | | |
| | | | |

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# CA-276199 Verification of Benefits - for all programs

## 1 OVERVIEW

The purpose of this SCR is to update the authorized amount variable population to incorporate the overridden EDBC for the CalWORKS, GA/GR, RCA, CAPI, and CalFresh programs.

### 1.1 Current Design

Currently, on CSF 142 form for the CalWORKS, GA/GR, RCA, CAPI, and CalFresh programs, the authorized amount is populated based on the first accepted and saved non-overridden EDBC run for the corresponding month in the Month/Year column. If the EDBC is overridden, the value is set to 0.

### 1.2 Requests

1. Update authorized amount variable population for the programs CalWORKS, GA/GR, RCA, CAPI, and CalFresh to include the overridden EDBC.

### 1.3 Overview of Recommendations

1. Update authorized amount variable population for the programs CalWORKS, GA/GR, RCA, CAPI, and CalFresh to include the overridden EDBC.

### 1.4 Assumptions

1. This SCR does not impact the CalSAWS GAGR Automated Solution Counties Exstream CC Service, as we are not invoking any GAGR services to populate the GAGR Authorized amount.

## 2 RECOMMENDATIONS

### 2.1 Update Authorized Amount Variable Population

#### 2.1.1 Overview

This effort will update the authorized amount variable population to incorporate the overridden EDBC for the CalWORKS, GA/GR, RCA, CAPI, and CalFresh programs.

**State Form:** CSF 142

**Programs:** All Programs

**Attached Forms:** N/A

**Forms Category:** Forms

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

### 2.1.2 Description of Change

Update the authorized amount variable population to incorporate the overridden EDBC for the CalWORKS, GA/GR, RCA, CAPI, and CalFresh programs

**Variable Population for CSF 142 (10/20) Form**

| SECTION | FILED | DESCRIPTION | EDITABLE |
|---|---|---|---|
| **CSF 142 - PAGE 1** | CalWORKs | Authorized Amount from the First EDBC run for the Corresponding Month in Month/Year column which satisfies the following conditions<br><br>• EDBC is run for CalWORKs program<br>• EDBC is either Regular or Read-only<br>• EDBC is Accepted and Saved<br>• EDBC source is not conversion<br>• EDBC Program Status is either Active or Ineligible<br>• EDBC doesn't have a budget or exists a Regular (RG) Budget or exists only one Prorated (PR) Budget<br>• EDBC has an Issuance for the Effective Month<br><br>If no EDBC found with Issuance, use the latest run EDBC for the corresponding month which satisfies all the above conditions except Issuance for the Effective Month<br><br>Authorized Amount Population:<br>Populate with the Authorized amount from the EDBC, except in the following condition, where the value should be set to 0.<br>• Issuance doesn't exist for the effective month or<br>• ~~EDBC is overridden~~ (This condition should be removed)<br><br>If no EDBC found for the corresponding month leave it blank.<br><br>Example: | N |

| Section | Filed | Description | Editable |
|---|---|---|---|
| | | Authorized Amount: 120<br>Populate:120.00<br><br>Authorized Amount: 0<br>Populate: 0.00 | |
| **CSF 142 - Page 1** | GA/GR | Authorized Amount from the First EDBC run for the Corresponding Month in Month/Year column which satisfies the following conditions<br><br>• EDBC is run for GA/GR program<br>  'GM' - C-IV Counties<br>  'GA' - LA County<br>  'GR' - CalWIN Counties<br>• EDBC is either Regular or Read-only<br>• EDBC is Accepted and Saved<br>• EDBC source is not conversion<br>• EDBC Program Status is either Active or Ineligible<br>• EDBC has Issuance for the Effective Month<br><br>If no EDBC found with Issuance, use the latest run EDBC for the corresponding month which satisfies all the above conditions except Issuance for the Effective Month<br><br>Authorized Amount Population:<br>Populate with the Authorized amount from the EDBC, except in the following condition, where the value should be set to 0.<br>• Issuance doesn't exist for the effective month or<br>• ~~EDBC is overridden~~ (This condition should be removed)<br><br>If no EDBC found for the corresponding month leave it blank.<br><br>Example:<br>Authorized Amount: 120<br>Populate:120.00<br><br>Authorized Amount: 0<br>Populate: 0.00<br><br>Authorized Amount: 231.57 | N |

| Section | Filed | Description | Editable |
|---|---|---|---|
| | | **Populate:231.57** | |
| **CSF 142 - Page 1** | RCA | Authorized Amount from the First EDBC run for the Corresponding Month in Month/Year column which satisfies the following conditions<br><br>• EDBC is run for RCA program<br>• EDBC is either Regular or Read-only<br>• EDBC is Accepted and Saved<br>• EDBC source is not conversion<br>• EDBC Program Status is either Active or Ineligible<br>• EDBC doesn't have a budget or exists a Regular (RG) Budget or exists only one Prorated (PR) Budget<br>• EDBC has Issuance for the Effective Month<br><br>If no EDBC found with Issuance, use the latest run EDBC for the corresponding month which satisfies all the above conditions except Issuance for the Effective Month<br><br>Authorized Amount Population:<br>Populate with the Authorized amount from the EDBC, except in the following condition, where the value should be set to 0.<br>• Issuance doesn't exist for the effective month or<br>• ~~EDBC is overridden~~ (This condition should be removed)<br><br>Example:<br>Example:<br>Authorized Amount: 120<br>Populate:120.00<br><br>Authorized Amount: 0<br>Populate: 0.00<br><br>Authorized Amount: 231.57<br>Populate:231.57 | N |
| **CSF 142 - Page 1** | **CAPI** | Authorized Amount from the First EDBC run for the Corresponding Month in Month/Year column which satisfies the following conditions. | N |

| SECTION | FILED | DESCRIPTION | EDITABLE |
|---|---|---|---|
| | | • EDBC is run for CAPI program.<br>• EDBC is either Regular or Read-only<br>• EDBC is Accepted and Saved<br>• EDBC Program Status is either Active or Ineligible<br>• EDBC doesn't have a budget or exists a Regular (RG) Budget or exists only one Prorated (PR) Budget<br>• EDBC has an Issuance for the Effective Month<br><br>Authorized Amount Population:<br>Populate with the Authorized amount from the EDBC, except in the following condition, where the value should be set to 0.<br>• Issuance doesn't exist for the effective month or<br>• ~~EDBC is overridden~~ (This condition should be removed)<br><br>If no EDBC found for the corresponding month leave it blank.<br><br>**Example:**<br>**Authorized Amount: 120**<br>**Populate:120.00**<br><br>**Authorized Amount: 0**<br>**Populate: 0.00**<br><br>**Authorized Amount: 231.57**<br>**POPULATE:231.57** | |
| **CSF 142 - PAGE 1** | CalFresh | Authorized Amount from the First EDBC run for the Corresponding Month in Month/Year column which satisfies the following conditions<br><br>• EDBC is run for CalFresh program<br>• EDBC is either Regular or Read-only<br>• EDBC is Accepted and Saved<br>• EDBC source is not conversion<br>• EDBC Program Status is either Active or Ineligible<br>• EDBC Budget Conditions<br>   o Doesn't have a budget or | N |

| Section | Filed | Description | Editable |
|---|---|---|---|
| | | <ul><li>o exists a CalFresh Gross Income (GI) Budget or</li><li>o exists either Transitional (TF) or Regular (RG) budget and no CalFresh Gross Income (GI) budget or</li><li>o exists only one Prorated (PR) Budget</li></ul><ul><li>EDBC has an Issuance for the Effective Month</li></ul>If no EDBC found with Issuance, use the latest run EDBC for the corresponding month which satisfies all the above conditions except Issuance for the Effective Month<br><br>Authorized Amount Population:<br>Populate with the Authorized amount from the EDBC, except in the following condition, where the value should be set to 0.<ul><li>Issuance doesn't exist for the effective month or</li><li>~~EDBC is overridden~~ (This condition should be removed)</li></ul>Example:<br>Authorized Amount: 120<br>Populate:120.00<br><br>Authorized Amount: 0<br>Populate: 0.00<br><br>Authorized Amount: 231.57<br>**POPULATE:231.57** | |

# 3 SUPPORTING DOCUMENTS

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

# CalSAWS

California Statewide Automated Welfare System



## CA-282061

# e-Application Search Results Enhancement

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| **CalSAWS** | Prepared By | Jennifer Muna | |
| | Reviewed By | Dymas Pena, Cathy Vaisau, William Baretsky, Nue Nelson, Melissa Mendosa, Gillian Bendicio | |
| **DATE** | **VERSION** | **REVISION DESCRIPTION** | **AUTHOR** |
| 3/5/2025 | 0.1 | Initial version | Jennifer Muna |
| 3/10/2025 | 0.2 | Added object for Export Mockup in Supporting Documents Section | Jennifer Muna |
| | | | |

# Table of Contents

# CA-282061 – e-Application Search Result Export Enhancement

## 1 OVERVIEW

This System Change Request (SCR) outlines the necessary modifications to include an export capability in the e-Application Search page.

### 1.1 Current Design

The e-Application Search page currently does not have an export capability.  Workers must manually track e-Applications from each paginated list of 25 -100 records by printing the page to retain the search results.

### 1.2 Requests

1. Add an export capability to extract the full results from the e-Application Search page into a XSLX file format.
2. Include additional reporting information upon extraction of the search results.

### 1.3 Overview of Recommendations

1. Add an export icon on the e-Application Search Results page.  This will include the generation of the search results in XSLX format, using the search parameters entered on the page.

### 1.4 Assumptions

1. All existing functionalities will retain their current logic unless specified in this SCR.
2. There are no changes to how the e-Application Search page work, this SCR is to add the functionality to enable users to export the data to an Excel report, which consists of data from the Search Results of the e-Application Search page.
3. e-Application Search page parameters that are left blank, where applicable, will pull and display all dataset options.

# 2  RECOMMENDATIONS

## 2.1  e-Application Search Page

### 2.1.1  Overview

The e-Application Search Page is the landing page of all e-Applications that are successfully submitted from the Self-Service Portal.  This section outlines the necessary modifications to support the page's export capability enhancement.

### 2.1.2  e-Application Search Results Page Mockup



**Figure 2.1.1 – e-Application Search Results – Export Icon**

### 2.1.3 Description of Changes

1. Add an Export icon ![icon] to the pagination section of the page. The export icon will only display when there are search results being returned on the e-Application Search Results Summary section.  When a user clicks this icon, a report is generated using the same search parameters entered on the e-Application Search page. Please refer to section 2.2 for additional details on the report layout and contents.
**Note:** Export icon will display at the top and at the bottom of the Search Result Summary section.

### 2.1.4 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search**

### 2.1.5 Security Updates

1. Security Rights

   N/A

2. Security Groups

   N/A

### 2.1.6 Page Mapping

N/A

### 2.1.7 Accessibility

N/A

### 2.1.8 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

## 2.2 e-Application Search Results Export Report

### 2.2.1 Overview

The e-Application Search Results Export Report will be available from the e-Application Search page and will provide a listing of e-Applications based on the Search Results from the selected parameters.

### 2.2.2 Description of Changes

1. Generate a report in XSLX format with two tabs containing the following attributes:
   a. General Information Sheet
      i. This sheet will contain the general information of the exported data based on the search results of the selected parameters on the e-Application Search page. This sheet will include a single table with a single column titled 'General Information' that will include the following attributes. See Supporting Documents section for mockup.

| Attribute | Description/Value |
|---|---|
| Report | e-Application Search Results Export Report |
| County | The name of the County that the user is logged in.<br>Example: County: Los Angeles |
| ES/IN | The Expedited Services or Immediate Need field. This includes the following values:<br><br>• **All** – *Default to 'All' if field is left blank.* This indicates the report will display all e-Applications with the below ES/IN values.<br>• **ES** – This indicates the report will display all e-Applications who applied for 'ES' only.<br>• **IN** – This indicates the report will display all e-Applications who applied for 'IN' only.<br>• **ES/IN** – This indicates the report will display all e-Applications who applied for 'ES/IN' only.<br>• **No** – This indicates the report will display all e-applications who did not apply for Expedited Services or Immediate Need.<br><br>Example: ES/IN: All |
| e-App Language | The spoken language indicated by the applicant with the available options: |

| | |
|---|---|
| | • **All** – *Default to 'All' if field is left blank.* This indicates the report will display all spoken languages results.<br>• **English** – This indicates the report will display all e-Applications with preferred language is English.<br>• **Spanish** – This indicates the report will display all e-Applications with preferred language is Spanish. |
| E-App Status | The e-Application status with the available options:<br>• **All** – The report will display all e-Applications, including all below statuses.<br>• **Data Transfer** – The report will display all e-Applications in 'Data Transfer' status.<br>• **GR-Rescission** - The report will display all e-Applications in 'GR-Rescission' status.<br>• **Not Accepted** – The report will display all e-Applications in 'Not Accepted' status.<br>• **Pending Clearance** – The report will display all e-Applications in 'Pending Clearance' status.<br>• **Posted** – The report will display all e-Applications in 'Posted' status.<br>• **Transferred to System** – The report will display all e-Applications in 'Transferred to System' status.<br>Example: E-App Status: Pending Clearance |
| Search By | As displayed in the e-Application Search page with the following options:<br>• **All** – The report will display all e-applications.<br>Example: Search By: All<br>• **Assigned Worker** – The report will display all e-Applications assigned to a Worker Id. Display as "Assigned Worker - <Worker ID>".<br>Example: Search By: Assigned Worker – 19AEGR3B00<br>• **Case** – The report will display all e-Applications associated to a specific case number. Display as " Case Number - <Case Number>". Example: Search By: Case Number – B6AE972<br>• **Office** – The report will display all e-Applications assigned to a specific Office Id in the county. Display as "Office - <Office Id>".<br>Example: Search By: Office – 23<br>• **Origin** – The report will display all e-Applications submitted by a specific entity. Display as "Origin - <Origin Options>". Available options include:<br>    o Anonymous User<br>    o Community Based Organization |

| | |
|---|---|
| |   o  Customer<br>  o  Government Agency<br>  Example: Search By: Origin – Customer<br><br>• **Program** – The report will display all e-Applications submitted for a program.  Display as "Program - <Program Name>".  Available values will include the following:<br>  o  CalFresh<br>  o  CalWORKs<br>  o  Disaster CalFresh<br>  o  General Assistance/General Relief (GR)<br>  o  Medi-Cal<br>  Example: Search By: Program - CalWORKs<br>• **Zip Code** – The report will display all e-Applications that were submitted from a specific zip code entered from the physical address. Display as "Zip Code – <Zip Code>".<br>  Example: Search By: Zip code - 94320 |
| Begin Date | This is the begin date entered on the e-Application Search page. Format: MM/DD/YYYY<br><br>Example: 01/01/2025 |
| End Date | This is the end date entered on the e-Application Search page. Format: MM/DD/YYYY<br><br>Example: 01/31/2025 |
| Run Date | Date and time the user clicks the export icon and generates the report. Format: MM/DD/YYYY hh:mm AM/PM<br><br>Example: 02/12/2025 10:32 AM |

b. Exported Data Sheet

| Column | Description |
|---|---|
| Special Circumstance | This column indicates if an applicant has requested assistance with their application due to a disability. Values will include:<br><br>• Yes<br>• No – Display when Special Circumstance icon is not applicable |
| ES/IN | This column indicates if an applicant has requested expedited services.  Values will include the following:<br><br>• ES |

| | |
|---|---|
| | - IN<br>- ES/IN<br>- No |
| e-App Number | This column will contain the e-Application Number |
| Application Date | This column will contain the date the application was submitted with format MM/DD/YYYY |
| e-App Status | This column will contain the e-Application status with the available values:<br>- All<br>- Data Transfer<br>- GR-Rescission<br>- Not Accepted<br>- Pending Clearance<br>- Posted<br>- Transferred to System |
| Applicant Name | This column will contain the Applicant's name in the following format as displayed on the e-Application Search Results Summary:<br>- Last name, First name |
| Case Number | This column will contain the Case Number linked to an e-Application. **Note**: Case Number will only display when an e-Application is linked to a case. |
| Zip Code | This column will contain the Applicant's physical address zip code as displayed on the e-Application Summary page. Homeless e-Applications without a physical address zip code will display the mailing address zip code. |
| City | This column will contain the city of the Applicant's physical address as displayed on the e-Application Summary page. Homeless e-Applications without a physical address city will display the mailing address city. |
| Assigned Worker ID | This column will contain the Worker ID of the staff worker as displayed on the e-Application Search and/or Summary page. **Note**: Worker ID will only display when e-Application has been assigned to a worker. |

| | |
|---|---|
| Assigned Worker Name | This column will contain the name of the worker assigned to the e-Application in the following format:<br><br>• Last Name, First name<br><br>**Note**: Worker Name will only display when e-Application has been assigned to a worker. |
| Office ID | This column will contain the office identification number associated to the e-Application. |
| Office Name | This column will contain the name of the physical office location as displayed on the e-Application Summary page. |
| e-App Language | This column will contain the spoken language indicated by the applicant. |
| Program(s) | This column will contain the program(s) as displayed on the e-Application Search and/or Summary page. |
| Origin | This column will contain the source information of the submitted e-Application and will have the following values:<br><br>• Anonymous User<br>• Community Based Organization<br>• Customer<br>• Government Agency |
| User Agency | This column will contain the agency name when origin of the e-App is 'Community Based Organization' or 'Government Agency'. |
| Transferred from Originating County | This column will contain the original county name of any transferred e-Applications received by the county. |

### 2.2.3 Page Location

- **Global: Case Info**
- **Local: e-Tools**
- **Task: e-Application Search > Search Result**

### 2.2.4 Security Updates

1. Security Rights

   N/A

   2. Security Groups

    N/A

### 2.2.5 Page Mapping

 N/A

### 2.2.6 Accessibility

 N/A

### 2.2.7 Page Usage/Data Volume Impacts

 There are no expected page usage/data volume impacts.

## 2.3  Automated Regression Test

### 2.3.1 Overview

Create a new automated regression test script to verify the export icon is displayed after performing a search on the e-Application Search page.

### 2.3.2 Description of Change

  1. Create a regression test script to verify that after performing a search on the e-Application Search page, the export icon is displayed.

# 3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|-----------------|-------------|------------|
| 1 | Report | e-Application Search Export Report Mockup | e-Application Search Export Report<br><br>e-Application Search Result Export Mockup |
|  |  |  |  |

# CalSAWS

California Statewide Automated Welfare System

Design

# CA-282342

MEDS - Stop sending ABAWD transaction & Data Elements to MEDS (ACIN I-62-24)

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| CalSAWS | Prepared By | Howard Suksanti, Trevor Torres | |
| | Reviewed By | | |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 1/13/2025 | 1.0 | Initial Revision | Howard Suksanti, Trevor Torres |
| | | | |
| | | | |

# Table of Contents

# CA-282342 – MEDS – Stop sending ABAWD transaction & Data Elements to MEDS (ACIN I-62-24)

## 1 OVERVIEW

Per ACIN I-62-24 (released 11/27/2024), CalSAWS should no longer send ABAWD information to MEDS.

### 1.1 Current Design

CalSAWS MEDS daily batch and quarterly recon transactions (FX20 and FR20) send DE1359 as a '1' to identify individuals aged 50 - 52 as ABAWD. When applicable, CalSAWS sends DE 1360 with the appropriate exemption code (E or Z) in subsequent FX60 transactions.

### 1.2 Requests

1. CalSAWS to no longer send DE1359 (ABAWD INDICATOR) or DE1356 (ABAWD-EFF-DT) with the FX20 and FR20 transactions.
2. CalSAWS to no longer send the FX60 transactions to update the ABAWD calendar. (DE1361 thru 1396 ABAWD STATUS HISTORY). Decommission the FX60 transaction.
3. Suppress alerts 2170, 2172 & 9539. Add an online logic to prevent Admin person to accidently turn the alert back on.

### 1.3 Overview of Recommendations

1. CalSAWS to no longer send DE1359 (ABAWD INDICATOR) or DE1356 (ABAWD-EFF-DT) with the FX20 and FR20 transactions.
2. CalSAWS to no longer send the FX60 transactions to update the ABAWD calendar. (DE1361 thru 1396 ABAWD STATUS HISTORY). Decommission the FX60 transaction.
3. Suppress alerts 2170, 2172 & 9539.

### 1.4 Assumptions

1. N/A.

# 2 RECOMMENDATIONS

## 2.1 MEDS Alert Admin Detail

### 2.1.1 Overview

This SCR will update the Alert Status field on the MEDS Alert Admin Detail page for Alert IDs '2170', '2172', & '9539' to no longer be editable when the page is in Edit mode, which will prevent Admin persons from accidently turning the alert back on.

### 2.1.2 MEDS Alert Admin Detail Mockup

**MEDS Alert Admin Detail**

✱ - Indicates required fields

[ Save and Return ] [ Cancel ]

**MEDS Alert Information**

| | |
|---|---|
| **Alert ID:** | **Alert Description:** |
| 2170 | ABAWD NOT UPDATED - AGE AT ABAWD-DATE INDICATES AGE EXEMPT |
| **Alert Type:** | **Alert Status:** |
| URGENT | Inactive |

**Task Information**

**Type:**
[ ▼ ]                                                                      **Status:** ✱

**Due Date:**                              **Default Due Date:**
[ Default Due Date ▼ ]                      10 days

**Initial Assignment:**                    **Default Assignment:**
[ Default Assignment ▼ ]                    MEDS Alert Task Distribution

**Sibling Assignment:**
[ No ▼ ]

**Program Priority:**
[ ▼ ]

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

▸ History

[ Save and Return ] [ Cancel ]

This Type 1 page took 0.76 seconds to load.

**Figure 2.1.1 – MEDS Alert Admin Detail Alert ID "2170" in Edit mode**

**MEDS Alert Admin Detail**

✱- Indicates required fields

[Save and Return]  [Cancel]

**MEDS Alert Information**

**Alert ID:**
2172

**Alert Description:**
ABAWD-STATUS INAPPROPRIATE - CLIENT NOT ABAWD PER MEDS

**Alert Type:**
URGENT

**Alert Status:**
Inactive

**Task Information**

**Type:**
[ ▾ ]

**Status:** ✱

**Due Date:**
[ Default Due Date ▾ ]

**Default Due Date:**
10 days

**Initial Assignment:**
[ Default Assignment ▾ ]

**Default Assignment:**
MEDS Alert Task Distribution

**Sibling Assignment:**
[ No ▾ ]

**Program Priority:**
[ ▾ ]

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

▸ **History**

[Save and Return]  [Cancel]

This Type 1 page took 0.75 seconds to load.

**Figure 2.1.2 – MEDS Alert Admin Detail Alert ID "2172" in Edit mode**

---

**MEDS Alert Admin Detail**

✱- Indicates required fields

[Save and Return]  [Cancel]

**MEDS Alert Information**

**Alert ID:**
9539

**Alert Description:**
RECIPIENT WILL BE AGE 50 NEXT MONTH - ABAWD WILL END

**Alert Type:**
ALERT

**Alert Status:**
Inactive

**Task Information**

**Type:**
[ ▾ ]

**Status:** ✱

**Due Date:**
[ Default Due Date ▾ ]

**Default Due Date:**
10 days

**Initial Assignment:**
[ Default Assignment ▾ ]

**Default Assignment:**
MEDS Alert Task Distribution

**Sibling Assignment:**
[ No ▾ ]

**Program Priority:**
[ ▾ ]

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

▸ **History**

[Save and Return]  [Cancel]

This Type 1 page took 0.77 seconds to load.

**Figure 2.1.3 – MEDS Alert Admin Detail Alert ID "9539" in Edit mode**

### 2.1.3 Description of Changes

1. Update the Alert Status field on the MEDS Alert Admin Detail page for Alert IDs '2170', '2172', & '9539' to no longer be editable when the page is in Edit mode.

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

   **Note:** Section 2.4 will do the data change that will update the Alert Status to Inactive for all 58 counties.

### 2.1.4 Page Location

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

### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

N/A

### 2.1.7 Accessibility

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

### 2.1.8 Page Usage/Data Volume Impacts

N/A

## 2.2 MEDS FX20 and FR20

### 2.2.1 Overview

FX20 transaction is used to add/Update CalFresh Record in MEDS.
FR20 transaction is for Reconcile Client Eligibility for CalFresh.

### 2.2.2 Description of Change

1. Modify FX20 and FR20 to not send DE1359 (ABAWD INDICATOR) or DE1356 (ABAWD-EFF-DT).

### 2.2.3  Partner Integration Testing

No.

### 2.2.4  Execution Frequency

No Change.

### 2.2.5  Key Scheduling Dependencies

No Change.

### 2.2.6  Counties Impacted

All Counties.

### 2.2.7  Category

Core-Off Prime.

### 2.2.8  Data Volume/Performance

N/A.

### 2.2.9  Interface Partner

MEDS.

### 2.2.10 Failure Procedure/Operational Instructions

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

## 2.3  MEDS FX60

### 2.3.1  Overview

FX60 transaction is for updating 36-Month CalFresh ABAWD Code in MEDS.

### 2.3.2  Description of Change

Modify FX60 to not send transactions to update the ABAWD calendar. (DE1361 thru1396 ABAWD STATUS HISTORY).

FX60 will be decommissioned.

### 2.3.3 Partner Integration Testing

No.

### 2.3.4 Execution Frequency

No Change.

### 2.3.5 Key Scheduling Dependencies

No Change.

### 2.3.6 Counties Impacted

All Counties.

### 2.3.7 Category

Core-Off Prime.

### 2.3.8 Data Volume/Performance

N/A.

### 2.3.9 Interface Partner

MEDS.

### 2.3.10 Failure Procedure/Operational Instructions

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

## 2.4 Modify MEDS Alert Inbound Reader Job

### 2.4.1 Overview

MEDS Alerts 2170, 2172, & 9539 are received through the daily MEDS inbound files. Modify the daily MEDS inbound reader jobs (PIXXE419) to exclude loading any MEDS Alerts 2170, 2172, & 9539 into CalSAWS.

### 2.4.2 Description of Change

2. Modify the daily MEDS alert inbound reader jobs to exclude any MEDS Alerts 2170, 2172, & 9539 received in the files from being loaded into CalSAWS.

### 2.4.3 Partner Integration Testing

N/A

### 2.4.4 Execution Frequency

No change

### 2.4.5 Key Scheduling Dependencies

No change

### 2.4.6 Counties Impacted

All counties

### 2.4.7 Category

No change

### 2.4.8 Data Volume/Performance

N/A

### 2.4.9 Interface Partner

Department of Health Care Services (DHCS).

### 2.4.10 Failure Procedure/Operational Instructions

No change

## 2.5 Data Change – Set MEDS Alert 2170, 2172, & 9539 to 'Inactive'

### 2.5.1 Overview

MEDS Alert 2170, 2172, & 9539 should be deactivated.

### 2.5.2 Description of Change

1. Create a data change to set the Alert Status of MEDS Alert 2170, 2172, & 9539 to 'Inactive' for all counties.

### 2.5.1 Estimated Number of Records Impacted/Performance

150 records

# CalSAWS

California Statewide Automated Welfare System

Design

# CA-282377
Recipient IEVS closed abstract assignment

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| **CalSAWS** | Prepared By | Howard Suksanti | |
| | Reviewed By | | |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 2/18/2025 | 1.0 | Initial draft | Howard Suksanti |
| 3/10/2025 | 1.1 | Added a note in section 2.1.2 on the IEVS worker setup. | Howard Suksanti |
| | | | |

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# CA-282377 – Recipient IEVS closed abstract assignment

## 1 OVERVIEW

### 1.1 Current Design

The IEVS batch assignment for IEVS Unit uses the worker office location to find the appropriate IEVS worker. Please find more details in SCR CA-265393.

### 1.2 Requests

Modify IEVS batch assignment for IEVS Unit to use the previous IEVS worker assigned location to determine the new closest worker assignment.

### 1.3 Overview of Recommendations

1. Modify IEVS batch assignment for IEVS Unit to use the previous IEVS worker assigned location to determine the new closest worker assignment.

### 1.4 Assumptions

1. There is no change on the IEVS Batch Assignment functionality that is not specified in this SCR.

## 2 RECOMMENDATIONS

### 2.1 IEVS Batch Assignment Jobs

#### 2.1.1 Overview

On the IEVS Batch assignment page when the assignment type is IEVS Unit, the batch will use the worker office location to determine the closest office of the new assignment.

#### 2.1.2 Description of Change

The following is the updated logic of the IEVS Batch assignment – IEVS Unit.

1. The hierarchy to be employed for IEVS Unit assignment is:
   1. If the case has open abstracts, then assign the new abstracts to the same worker.
      a. When there are multiple open abstracts on the previous quarter that are assign to different workers for the same case, the batch will start assigning the abstract to the same worker moving forward. The batch will assign to the IEVS worker that was assigned the latest.
      <u>For example</u>, Worker A has the first quarter IFDS abstract assigned. Worker B has a third quarter IFDS abstract assigned. Individual abstracts are for the same case. Individual abstracts are still open. The batch will assign both new abstracts to Worker B.
   2. If there is an abstract for the same case on the current batch run, assign the abstract to the same IEVS worker.
   3. If there are no open abstracts look for the IEVS worker in the same office.
      a. When there is no worker on the case, the batch will use the previous assign worker office to find the new assignment.
   4. If there is no IEVS worker in same office, then assign it to the IEVS worker in the closest office. The office is based on the program worker's office address and not the primary applicant's address. The latitude and longitude of the program worker's office address will be used to find the nearest office which has an active IEVS worker. The program worker is chosen based on the program hierarchy CW, CF, GA/GR, (CP)CAPI, RCA, MC.
   5. The batch will randomly assign the abstract to an IEVS Worker within the county when the batch cannot find a worker from steps above.

==Note: IEVS Worker is the worker that has the IEVS (IFDS, NHR, PVS, etc.) selection on the Position Detail page. The selection on the Position Detail page must match the IEVS abstract type.==

The IEVS Unit assignment type is applicable for below jobs.
- PVS Abstract assignment job PBXXC405
- NHR Abstract assignment job PBXXC403
- IFD Abstract assignment job PBXXC400
- IFDM Abstract assignment job PBXXC401
- FF Abstract assignment job PBXXC402
- NPM Abstract assignment job PBXXC404

### 2.1.3 Execution Frequency

No change. Daily.

### 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…)

# CalSAWS

California Statewide Automated Welfare System



# CA-285956

Update Application Registration Automated Action
Assignment Options

# CalSAWS

| DOCUMENT APPROVAL HISTORY | | | |
|---|---|---|---|
| Prepared By | Vallari Bathala | | |
| Reviewed By | Justin Dobbs, Sarah Rich, Dymas Pena, Carlos Albances | | |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 01/13/2025 | 1.0 | Initial Revision | Vallari Bathala |
| | | | |
| | | | |

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# CA-286956 – Update Application Registration Automated Action Assignment Options

## 1 OVERVIEW

This design outlines modifications to the Application Registration Automated Actions to utilize the Specific Bank Task assignment functionality.

### 1.1 Current Design

Some Automated Actions with in CalSAWS are not configurable because they are tied to specific processing logic that must remain consistent for all Counties. SCR CA-264180 introduced routing to a specific Task Bank for the Clearance e-Application Automated Action. The following Automated Actions are similar to Clearance e-Application and do not allow routing into a specific Bank:

- Clearance
- Clearance: CMIPSII
- Clearance CalHEERS
- Clearance: ICT
- Intake

### 1.2 Requests

Introduce an additional Automated Action assignment option that will allow the Automated Actions defined in the in this design to have the option to route into a Specific Bank.

### 1.3 Overview of Recommendations

1. Update the following Automated Actions to include the option to assign to a Specific Bank:
   - Clearance
   - Clearance: CMIPSII
   - Clearance CalHEERS
   - Clearance: ICT
   - Intake

### 1.4 Assumptions

Task category is not evaluated for Bank.

# 2 RECOMMENDATIONS

## 2.1 Application Registration Automated Actions

### 2.1.1 Overview

The Automated Action framework allows county users a level of configurability for automated task generation on the Automated Action Detail page.

This section outlines the modifications required to update the "Clearance", "Clearance: CMIPSII", "Clearance CalHEERS", "Clearance: ICT" and "Intake" Automated Actions in the CalSAWS System.

### 2.1.2 Automated Action Detail Mockup



**Figure 2.1.2-1 – Intake Automated Action Detail View Mode**

**Automated Action Detail**

<div style="text-align:right">[ Save And Return ] [ Cancel ]</div>

**Action Information**

| | | |
|---|---|---|
| **Name:** | **Type:** | **Status:** ✱ |
| Clearance | Create Task | [ Active ▾ ] |
| **Program(s):** | **Run Date:** | **Source:** |
| All Programs | Real Time | Online |

**Scenario:**
A new application has been received. Please review and take appropriate action.

**Task Information**

**Task Type:**
Clearance

| | |
|---|---|
| **Due Date:** | **Default Due Date:** |
| Default Due Date | 1 day |
| **Initial Assignment:** | **Bank ID:** ✱ |
| [ Specific Bank ▾ ] | [ 19ASL1000KBK ] [ Select ] |

**Sibling Assignment:**
No

**Guided Navigation:** ✱
No

**Long Description:**
Clearance: {PROGRAMS}

<div style="text-align:right">[ Save And Return ] [ Cancel ]</div>

**Figure 2.1.2-2 – Intake Automated Action Detail Edit Mode**

### 2.1.3  Description of Changes

Update the Automated Action Detail page to include Specific Bank assignment option for the following Automated Actions:

- Clearance
- Clearance: CMIPSII
- Clearance CalHEERS
- Clearance: ICT
- Intake

1. Task Information:
    a. Initial Assignment – Make the 'Initial Assignment' dropdown editable with the following options:
        i. Default Assignment (Default)
        ii. Specific Bank – Selecting this option will dynamically display a "Bank ID" field.
            1. The Bank ID (**required**) field displays a "Select" button that navigates to the Select Bank page where a Bank can be chosen for the Bank ID field. A Bank ID can also

be entered manually. When a Bank is specified in the Specific Bank field, all resulting Tasks from this Automated Action will be configured to that Task Bank. Note: Task Category is not evaluated as part of this direct assignment processing, so the Specific Bank does not require the specific Task Category to be selected on the Bank Detail page.

### 2.1.4 Page Validations

N/A

### 2.1.5 Page Location

Automated Action Detail Page:

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Automated Actions > Task Admin
  Click on a hyperlink of the desired 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

N/A

### 2.1.8 Accessibility

None.

### 2.1.9 Page Usage/Data Volume Impacts

N/A

## 2.2 Automated Regression Test

### 2.2.1 Overview

Create automated regression test scripts to verify that "Specific Bank" assignment can be selected and saved for the following Automated Actions: "Clearance", "Clearance: CMIPSII", "Clearance CalHEERS", "Clearance: ICT, Intake".

## 2.2.2 Description of Change

1. Create regression scripts to verify the following on the Automated Action Detail page for each applicable Automated Action:
   a. Initial Assignment option "Specific Bank" is selectable.
   b. The Bank ID field:
      i. Displays and is required when "Specific Bank" is selected from the Initial Assignment dropdown.
      ii. Is not displayed when another value is selected from the Initial Assignment dropdown.
   c. Clicking the "Select" button next to the Bank ID field navigates to the Select Bank page:
      i. Clicking the Cancel button returns to the Automated Action Detail page in edit mode with no change to the Bank ID field population.
      ii. Selecting a Bank and clicking the Select button returns to the Automated Action Detail page in edit mode with the selected Bank ID value populated.
   d. The Initial Assignment can be updated from "Default Assignment" to "Specific Bank" and saved.
   e. The Initial Assignment can be updated from "Specific Bank" to "Default Assignment" and saved.

**Technical Note:** Applicable Automated Actions include the following:
   f. Clearance
   g. Clearance: CMIPSII
   h. Clearance CalHEERS
   i. Clearance: ICT
   j. Intake

# 3 SUPPORTING DOCUMENTS

N/A

# 4 REQUIREMENTS

## 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-------|------------------|---------------------|
| 2.19.1.3 | The LRS shall include the ability to take automatic action on specified case maintenance activity. | 1. Update the Application Registration Automated Actions to allow Task routing into a specific Task Bank. |
| | | |

# 5 OUTREACH

N/A

# 6 APPENDIX

N/A

# CalSAWS

California Statewide Automated Welfare System

Design

# CA-286724

Update Batch Job PB00M106 to close the CFET program 90 Days after CalFresh is Discontinued

| | DOCUMENT APPROVAL HISTORY | | |
|---|---|---|---|
| | Prepared By | Howard Suksanti | |
| | Reviewed By | | |

| DATE | VERSION | REVISION DESCRIPTION | AUTHOR |
|---|---|---|---|
| 02/03/2025 | 1.0 | Initial Draft | Howard Suksanti |
| | | | |
| | | | |

CalSAWS

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# CA-285724 –Update Batch Job PB00M106 to close the CFET program 90 Days after CalFresh is Discontinued

## 1 OVERVIEW

Per ACL 21-48 if a county chooses to offer job retention services, they must provide participants with job retention services for at least 30 days and no more than 90 days in accordance with 7 CFR 273.7(e)(2)(viii).

### 1.1 Current Design

PB00M106 is a daily batch job that deregister CFET program after the effective date of the Discontinued CalFresh program for counties that have opt-in. The batch selects on CFET program that is not in Deregister status.

### 1.2 Requests

Per ACL 21-48 if a county chooses to offer job retention services, they must provide participants with job retention services for at least 30 days and no more than 90 days in accordance with 7 CFR 273.7(e)(2)(viii).

Create a batch process to give counties who have opted-in the option to have the CFET deregistered after the CF discontinuance or 90 days after the CF discontinuance is effective.

### 1.3 Overview of Recommendations

1. Create a Batch Property Change Request (BPCR) for a new batch job that will deregister CFET after 90 days from the CF discontinuance effective date.
2. Schedule the Deregister CFET after 90 days job to run daily.
3. Opt-in counties that are listed in the support document to this 90 Day CFET Deregister batch job.
4. Create a Batch Property Change Request (BPCR) to remove counties that opt-in to the 90 Day batch from the existing PB00M106 batch job. Please find the updated list of County that opt-in to PB00M106 and the new 90 Day batch job in the supporting document.

### 1.4 Assumptions

1. There will be no change to the functionality of the PB00M106 batch.

# 2 RECOMMENDATIONS

The SCR will create a batch job that will deregister CFET program after 90 days.

## 2.1 Create a new Deregister CFET after 90-day batch

### 2.1.1 Overview

Create a new batch job that will deregister CFET program after 90 days.

### 2.1.2 Description of Change

1. Create a BPCR and BSCR to schedule the batch job.
2. The batch will deregister CFET program based on the table below.

CalFresh program is discontinued:

| CFET PROGRAM STATUS | AND | AND | ACTION |
|---|---|---|---|
| CFET is Deregistered | N/A | N/A | No action (existing functionality) |
| CFET is Active/Pending/ in any status that is not Deregister | The Customer's Employment Detail page has an Employment record for that individual with a start date within the last 90 days from the Batch Run Date. | The Customer is enrolled in CFET Job Retention Services | Keep CFET open for up to 90 days following the CF Disc effective date. |
| | | The Customer is enrolled in any other activity (in any category type) besides Job Retention Services | Close CFET when the CF Disc effective. |
| | | The Customer is not enrolled in any activity. | Close CFET when the CF Disc effective. |
| | The Customer's Employment Detail page does NOT have an employment record with a start date in the last 90 days from the Batch Run Date. | The Customer is enrolled in CFET Job Retention Services | Close CFET when the CF Disc effective. |
| | | The Customer is enrolled in any other activity (in any category type) besides Job Retention Services | Close CFET when the CF Disc effective. |

| | |
|---|---|
| The Customer is not enrolled in any activity. | Close CFET when the CF Disc effective. |

### 2.1.3  Execution Frequency

Daily Mon-Sat except holidays.

### 2.1.4  Key Scheduling Dependencies

N/A.

### 2.1.5  Counties Impacted

TBD.

### 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…).

## 2.2  Update PB00M106 batch

### 2.2.1  Overview

PB00M106 is a daily batch job that deregister CFET program after the effective date of the Discontinued CalFresh program. This SCR will remove county that opt-out for this batch.

### 2.2.2  Description of Change

1. Create a BPCR to opt-out counties that no longer opt-in to this batch. Please find the list of counties in the support document.

### 2.2.3  Execution Frequency

No Change. Daily.

### 2.2.4  Key Scheduling Dependencies

No Change.

### 2.2.5  Counties Impacted

TBD.

### 2.2.6  Category

Core

### 2.2.7  Data Volume/Performance

N/A.

### 2.2.8  Failure Procedure/Operational Instructions

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

# 3  SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|---|---|---|---|
| 1 | Batch | List of County that opt-in to PB00M106 | List of County that opt-in to PB00M106.xlsx |
| 2 | Batch | List of County that opt-in to the new CFET Deregister after 90-day | List of County that opt-in to the new CFET Deregister after 90-day.xlsx |
| 3 | Batch | List of County that opt in to PB00M106 prior to this SCR | List of County that opt in to PB00M106 prior to this SCR.xlsx |