

CalSAWS

California Statewide Automated Welfare System



CA-213317

Enhance Medi-Cal Rescind Functionality

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CA-213317 – Enhance Medi-Cal Rescind Functionality

1 OVERVIEW

1.1 Current Design

When an individual is discontinued from Medi-Cal for 'Failure to Complete Redetermination' due to not returning their Medi-Cal Renewal packet, then subsequently turns in their Medi-Cal Renewal packet before the discontinuance effective date, The System will Auto-Rescind the Medi-Cal discontinuance overnight if the user did not already start the rescission. The Auto-Rescind batch is scheduled to run daily from batch 10-day through the 5th calendar day of the following month. It rescinds individuals who are discontinued for 'Failure to Complete RE' and with a discontinuance date as the first of the month following MC RE Due Date to their prior eligibility based on a 'Reference EDBC' if the Medi-Cal renewal packet is marked 'Received' into The System with a 'Received Date' on or before the last day of the RE Due month.

The Auto-Rescind batch job schedules EDBC to be run in batch with the run reason as 'Rescind'. This batch rescind EDBC run will bypass the regular Medi-Cal eligibility determination process and will instead copy over the passing budgets from the 'Reference EDBC' for the discontinued/rescinded individuals. If the Medi-Cal program also contained active individuals with continuing eligibility due to a partial discontinuance. Then for these individuals, the Rescind EDBC run will copy over the passing budgets from the saved and accepted Regular EDBC for the same benefit month that EDBC is currently running for. This logic will run for all the benefit months where EDBC is running in 'Rescind' mode in batch. The number of months to run is dependent based on the MEDS Renewal dates and the 10 day cutoff dates and EDBC can run for only one month or for two months based on when the Auto-Rescind batch job processed the case.

The current logic to determine the 'Reference EDBC' is limited to a 'System Rescind' that happens as a result of the auto-rescind batch job.

The Current System functionality for a rescind online is not a true rescind; instead, it Pends the Person Application (and Program if applicable), and the user must send a new MAGI Eligibility Determination Request (EDR), wait for a new MAGI Determination of Eligibility Response (DER) and then run Medi-Cal EDBC to determine Medi-Cal eligibility. The Medi-Cal eligibility is determined based on the current case information so the eligibility result may not be the same as rescinding to the eligibility prior to discontinuance. If the user needs to restore to prior eligibility while waiting for additional information from the beneficiary, this requires additional steps like alternate procedures or override the EDBC to put the individual back on their prior eligibility while waiting for the beneficiary to provide the missing items.

The Auto-Rescind batch job also creates a “Rescind” EDR to CalHEERS. A Rescind EDR will remove the existing negative action. CalHEERS treats a “Rescind” EDR as a “Continuing” EDR and evaluates MAGI eligibility as normal. This will restore MAGI eligibility in CalHEERS for the rescinded individuals if all the other criteria for MAGI eligibility are satisfied. The inbound eHIT logic saves the DER with status ‘Suppressed’ (if the Batch Indicator ‘Yes’) because the Rescind EDBC uses the Reference EDBC for eligibility details and the ‘Rescind’ DER is ignored.

If the case/individual was discontinued for “failure to complete RE” close to the end of the calendar year and the case/individual was rescinded on the next calendar year, and a renewal EDR is sent to CalHEERS to complete the renewal cycle, CalHEERS will be unable to reconcile the renewal as it would have created a new renewal cycle for the new calendar year. Due to this, CalHEERS will have difficulties restoring benefits for the months in the prior calendar year. The “Rescind” EDR will reopen the original renewal cycle the rescinded individual/case along with removing the negative action, thereby allowing CalHEERS to easily restore benefits for all the months.

Currently there is no functionality for the user to send an EDR with a ‘Rescind’ Run Reason online.

¹ For the purposes of the Auto- Rescind job, a ‘Reference EDBC’ is defined as the most recent Regular EDBC of the Medi-Cal program for the month prior to the Discontinued benefit month.

1.2 Requests

1. Update the Medi-Cal program to have true rescind functionality for online EDBC.
2. Update the Medi-Cal EDBC rules for Auto-Rescind to use the Reference EDBC for both benefit months run in Batch.
3. Add a Batch EDBC skip to not process Medi-Cal EDBC when the last EDBC is a Rescind EDBC and the EDBC is not run for Auto-Renewal or Auto-Discontinuance.

1.3 Overview of Recommendations

1. Update the Run EDBC page to display a new ‘Rescind’ option on the Run Reason dropdown for the Medi-Cal program if the Medi-Cal program is rescinded from a Discontinuance and at least one rescinded individual is pending for the Medi-Cal program.
2. Add a soft page validation when ‘Rescind’ is selected as the Medi-Cal EDBC Run Reason and the Reference EDBC meets criteria that results in the system not generating a NOA upon restoration.
3. Update the MAGI Determination List page to display a “Rescind MAGI Eligibility” checkbox if there is at least one Pending individual on a Medi-Cal program from a Discontinuance Rescind.
4. Medi-Cal EDBC rules will now allow users to perform a true online rescind for discontinued individuals.

5. Update the eHIT webservice to save the 'Rescind' DER with status 'Suppressed' regardless of the EDR being sent through Batch or online.
6. Add a new Batch EDBC Skip to not process a Medi-Cal program when the last EDBC is a Rescind EDBC except when the Batch EDBC was initiated from the MAGI Auto-Renewal or Medi-Cal Auto-Discontinuation sweeps.

1.4 Assumptions

1. Online Rescind EDBC can only be run for one month at a time. If an individual is rescinded three months after the discontinuation and the Medi-Cal program is still Active due to ongoing eligibility for other individuals, then the user must run the Rescind EDBC separately for each month.
2. The user is not required to rescind to prior eligibility when they rescind a Medi-Cal discontinuation online; they have the flexibility to rescind and restore to the prior eligibility – or they can run EDBC based on the updated case information and not select the 'Rescind' run reason.
3. The Medi-Cal renewal date will not be advanced with a 'Rescind' EDBC. The 'Rescind' logic is meant as a temporary restoration of eligibility until the user has the necessary information to complete the renewal. The user must run Medi-Cal EDBC with 'RE' Run reason to run through the entire Medi-Cal EDBC Rules and advance the renewal date.
4. CalHEERS Project does not currently have special logic for 'Rescind' Run Reason when receiving EDRs. CalHEERS treats an EDR with the 'Rescind' Run Reason as the same as a 'Continuing' EDR. For the purposes of this change, the EDR with the 'Rescind' Run Reason is for tracking and removing the Negative Action in CalHEERS.
5. A job aid providing an overview of the Medi-Cal rescind functionality will be published with SCR CA-289506

2 RECOMMENDATIONS

2.1 Run EDBC Page

2.1.1 Overview

Update the Run EDBC page to display a new 'Rescind' option on the Run Reason dropdown for the Medi-Cal program if the Medi-Cal program is rescinded from a Discontinuance and at least one rescinded individual is pending for the Medi-Cal program.

Add a soft page validation when 'Rescind' is selected as the Medi-Cal EDBC Run Reason and the Reference EDBC meets criteria that results in the system not generating a NOA upon restoration.

2.1.2 Run EDBC Page Mockup

The mockup shows the 'Run EDBC' page. At the top, there's a header 'Run EDBC' and three buttons: 'Change Reason', 'Run EDBC', and 'Cancel'. Below this, a legend indicates that an asterisk (*) denotes required fields. The 'Benefit Processing Range' section includes 'Begin Month' and 'End Month' dropdowns, both set to '03/2025'. A table with columns 'Program', 'Status', 'Timely Notice Exception', 'Reason', and 'Run Reason' contains one row for 'Medi-Cal' with 'Active' status. The 'Run Reason' dropdown is open, showing 'Rescind' as the selected option. At the bottom, there are three buttons: 'Change Reason', 'Run EDBC', and 'Cancel'.

Figure 2.1.1 – Run EDBC Page

This mockup shows the 'Run EDBC' page after selecting 'Rescind' as the Run Reason. The 'Timely Notice Exception' dropdown is now set to 'No'. A red-bordered box contains a warning message: 'Medi-Cal: This Rescind EDBC run may not generate any notices including the Rescind notice. Please generate any required notices manually.' Below this message, a note states: 'To continue running EDBC, click the "Run EDBC" button.' The 'Run EDBC' button is highlighted. The page layout is otherwise identical to the previous mockup.

Figure 2.1.2 – Soft Validation

2.1.3 Description of Changes

1. Update the Run EDBC page to populate the Run Reason dropdown for the Medi-Cal program with the reason of “Rescind” when at least one individual has a current status of ‘Pending’ for the selected benefit month and the associated event is ‘Discontinuance Rescinded’ (CT157_DR).
Note: The EDBC Run Reason only displays when EDBC is run for a single month.
Technical Note: Update CT744_RS to have MC (REFER_TABLE 7_DESCR) set to ‘Y’.
2. Update the Run EDBC page to add a page warning message when the user selects ‘Rescind’ Run Reason for the Medi-Cal program and clicks ‘Run EDBC’ and at least one of the below conditions are met:
 - a. The ‘Reference EDBC’ is a Manual EDBC.
 - b. The ‘Reference EDBC’ is an overridden EDBC.
 - c. Any individual pending in the Rescind EDBC has an ‘Ineligible’ person status in the ‘Reference EDBC’.
Warning Message: “Medi-Cal: This Rescind EDBC run **will may** not generate any notices including the Rescind notice. Please generate any required notices manually.”

Note: This message is a soft validation and will not prevent the user from running Medi-Cal EDBC.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Run EDBC**

2.1.5 Security Updates

No Changes to Security Rights or Groups.

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 MAGI Determination List Page

2.2.1 Overview

Update the MAGI Determination List page to display a “Rescind MAGI Eligibility” checkbox if there is at least one Pending individual on a Med-Cal program from a Discontinuance Rescind.

2.2.2 MAGI Determination List Page Mockup

MAGI Determination List

*- Indicates required fields

Request MAGI Determination

Begin Month: *

01/2025

End Month: *

04/2025

Program Identifier: *

Medi-Cal

Life Change Event:

☐ Bypass Primary Contact Matching Criteria

☐ Request Lift Options

☐ Request Negative Action Determination

☐ Restart VLP e-Verification

Request MAGI

Display MAGI Determinations

Begin Date:

End Date:

View

Search Results Summary

Results 1 - 1 of 1

Benefit Month	Type	Status	Time Run	System Initiated	Household Eligibility
01/2025	Determination	Complete	11/21/2024 11:12 AM	CalSAWS	Not Eligible

Figure 2.2.1 –MAGI Determination List Page

2.2.3 Description of Changes

1. Update the MAGI Determination List page to display a “Rescind MAGI Eligibility” checkbox when at least one individual has a current Medi-Cal person status of Pending for the selected benefit month(s) and the event associated to the Pending status is 'Discontinuance Rescinded' (CT157_DR).

2.2.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: MAGI Eligibility**

2.2.5 Security Updates

No Changes to Security Rights or Groups.

2.2.6 Page Mapping

Add Page mapping for the new "Rescind MAGI Eligibility" checkbox.

2.2.7 Accessibility

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

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Medi-Cal Eligibility Rules Updates

2.3.1 Overview

Medi-Cal EDBC rules will now allow users to perform a true rescind for online Rescind Discontinuances.

2.3.2 Description of Changes

1. Update the Medi-Cal EDBC rules to copy over the passing budgets from the 'Reference EDBC' for the rescinded individual(s) when EDBC is run online for the Medi-Cal program with the 'Rescind' Run Reason and the individual is Pending from a Discontinuance Rescind event.
 - a. None of the budget hyperlinks will display since these are copied budgets.
 - b. Leverage the Medi-Cal EDBC logic to determine the 'Reference EDBC' added with SCR CA-202862 except expand to include a Discontinuance Rescind for any reason and not limit to only a 'System Rescind'.
2. Update the Medi-Cal EDBC rules to copy over the passing budgets from the saved and accepted Regular EDBC for the same benefit month for the non-rescinded individuals when EDBC is run online for the Medi-Cal program with Rescind Run Reason.
 - a. None of the budget hyperlinks will display since these are copied budgets.

Examples:

1. Case with a parent(P01) and child(P02) passing for MAGI eligibility with Renewal due 08/2025. The parent fails MAGI eligibility during renewal for income over the MAGI FPL limit and are discontinued while the children continue MAGI eligibility as their MAGI FPL limit is higher. The renewal packet is returned by 08/29/2025 and is scanned in on 09/05/2025 so the user manually rescinds the parent and runs Rescind EDBC for the benefit month of 08/2025. EDBC will copy over the passing budget from 07/2025 for the parent and will copy over the passing budget from 08/2025 for the child. The user then runs Rescind EDBC for the benefit month of 09/2025(Come-up month). EDBC will again copy over the passing budget from 07/2025 for the parent and will copy over the passing budget from 08/2025 for the child.

2.3.3 Programs Impacted

Medi-Cal

2.3.4 Performance Impacts

N/A

2.4 EHIT Updates

2.4.1 Overview

Update the eHIT webservice to save the 'Rescind' DER with the status 'Suppressed' regardless of if the EDR being sent through Batch or online.

2.4.2 Description of Changes

1. Update DER Webservice to save a DER with the status 'Suppressed' if the DER has the Run Reason Code 'Rescind' regardless of if the EDR being sent in Batch or online.
2. Update the EDR logic to set the Run Reason to 'Rescind' (CT395_RC) if the user checks the box for "Rescind MAGI Eligibility" on the MAGI Determination List page and clicks 'Request MAGI'.
 - a. If the user selects both 'Rescind MAGI Eligibility' and a Negative Action, then the Run Reason will be set to 'Negative Action'.

2.4.3 Programs Impacted

Medi-Cal

2.4.4 Performance Impacts

N/A

2.5 Batch EDBC Skip

2.5.1 Overview

Add a new Batch EDBC Skip to not process a Medi-Cal program when the last EDBC is a Rescind EDBC except when the Batch EDBC was initiated from the MAGI Auto-Renewal or Medi-Cal Auto-Discontinuance sweeps.

2.5.2 Description of Change

1. Add a new Batch EDBC Not Processed Reason (CT707) to skip a Medi-Cal program when all following are true:
 - a. The High dated EDBC has a Run Reason Code of 'Rescind' (CT744_RS).
 - b. The EDBC is for the Medi-Cal program.
 - c. The Medi-Cal program is Active for the targeted EDBC benefit month.
The Batch Medi-Cal EDBC was not initiated by the MAGI Auto-Renewal Sweep (PB00E120), or the Medi-Cal Auto-Discontinuance Sweeps (PB00E121 or PB00E182).

Not Processed Reason Code (CT707)

Short Decode Name	EDBC has not been run since Rescind
Long Decode Name	EDBC has not been run since Rescind

Examples:

- A. The Medi-Cal program has a high-dated EDBC with Run Reason 'Rescind' with the begin month 01/2025. A MAGI Age sweep identified the Medi-Cal program for Batch EDBC processing for 05/2025. Batch EDBC will skip this program for the reason 'EDBC has not been run since Rescind'.
- B. The Medi-Cal program has a high-dated EDBC with Run Reason 'Rescind' with the begin month 08/2025. The SSA COLA identified the Medi-Cal program for Batch EDBC processing for 01/2026. Batch EDBC will skip this program for the reason 'EDBC has not been run since Rescind'.
- C. The Medi-Cal program has a high-dated EDBC with Run Reason 'Rescind' with the begin month 03/2025. The MAGI Auto-Renewal sweep identified the Medi-Cal program for Batch EDBC processing for 02/2026. Batch EDBC will NOT skip this program for the reason 'EDBC has not been run since Rescind' and will allow Batch EDBC to process the case.

2.5.3 Counties Impacted

All Counties.

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to verify Run Reason 'Rescind' availability and soft validation on the Run EDBC page in an applicable scenario.

2.6.2 Description of Change

1. Create regression scripts to verify each of the following:
 - a. Run Reason 'Rescind' can be selected on the Run EDBC page when at least one person is in Pending status for the benefit month and the associated event is 'Discontinuance Rescinded'.
 - b. A soft validation message displays on the Run EDBC page when the Run EDBC button is clicked and:
 - i. Run Reason 'Rescind' is selected
 - ii. The reference EDBC is a Manual EDBC
 - c. The 'Rescind MAGI Eligibility' checkbox can be selected on the MAGI Determination List page when at least one person is in Pending status for the benefit month and the associated event is 'Discontinuance Rescinded'.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-245049

ACL 24-53 Update CF 388 Approval and CF 389
Denial for Reinstatement of Aid

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brendan Mandyam
	Reviewed By	Tiffany Huckabee

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/5/2025	1.0	Initial Design	Brendan Mandyam
4/18/2025	3.0	Content Revision – Update the CF 388 Form Variable population to make all fields editable (recommendation 2.8), removed automated NOA reasons which do not have triggers (recommendation 2.1, 2.6), clarified that the program ends in a discontinued state when a household is denied for Reinstatement. Made clear that a CF 388 or CF 389 should generate for all non-RE rescind reasons. Simplified Supporting documents for the updated Reasons on the CF 388 and CF 389 (recommendation 2.1, 2.6), and corrected revision dates.	Brendan Mandyam
4/24/2025	4.0	Content Revision – Updated Recommendation 2.3 to change the full approval for Reinstatement reason to a General Approval for Reinstatement Reason. Updated Recommendation 2.1 to suppress the general Approval Reason if any Mixed Approval Denial Reasons generate. Added a recommendation to suppress the CF 377.1 if a CF 388 generates (recommendation 2.13).	Brendan Mandyam
4/28/2025	5.0	Added a clarification stating that not all reason fragments in recommendation 2.1 will generate in all threshold languages, and to refer to supporting document #7 for languages by reason.	Brendan Mandyam

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1 OVERVIEW

1.1 Current Design

When a user restores CalFresh with pro-rated benefits, the generated CF 388 CalFresh Notice of Restoration Approval NOA only states the client's prorated benefit amount. It does not state the full-month benefit amount for the following month. The CF 389 Notice of Denial of Restoration is only available in the Template Repository.

1.2 Requests

1. Update the CF 388 triggered via EDBC.
2. Add an auto-trigger for the CF 389 via EDBC.
3. Update the CF 388 and CF 389 in the Template Repository to the most current State version.
4. Add threshold languages for the CF 388 and CF 389 in the Template Repository and auto-triggered via EDBC.

1.3 Overview of Recommendations

1. Update the Reason Fragment that generate on the CF 377.1 (8/24) Mixed Approval Notice to also generate on the CF 388 (7/24) Notice.
2. Update the Action Fragment CF_AP_ACTION4 (ID: 4003) with Reinstated CalFresh Benefit Period Details and a list of individuals approved for Reinstated CalFresh Benefits
3. Update the Reason Fragment CF_AP_CF_RESTRA_F902 (ID: 6122) to only be used for full approvals for Reinstatement of CalFresh.
4. Adding the CalFresh Benefit details as a Message Fragment

5. Add a new Action Fragment for the Denial of Reinstatement of CalFresh Benefits
6. Update CalFresh Non-RE Denial Reasons to generate on the CF 389 (7/24) Notice
7. Add a new NOA message Fragment on the CF 389 (7/24)
8. Update the CF 388 Form to the most recent state version (7/24) in the Template Repository.
9. Update the CF 389 Form to the most recent state version (7/24) in the Template Repository.
10. Generate the CalFresh Budget and Explanation of two Food Benefit Programs on the CF 388 (7/24) and CF 389 (7/24)
11. Generate the Non-Discrimination Statement on the CF 388 and CF 389.
12. Suppress all other CalFresh Notices for the month when the CF 389 (7/24) generates.

1.4 Assumptions

1. The Non-Discrimination statement, CalFresh Budget, and Explanation of Two Food benefit Programs will be added to the CalFresh NOA templates as part of SCR CA-265360. This effort will update their generation conditions to Generate on the CF 388 and CF 389.
2. The CF 388 and CF 389 automated notices will use the existing Denial reason fragments that currently generate for the CF 377.1.
3. No new denial reasons for CalFresh will be added in this effort.
4. If the user rescinds a discontinued CalFresh program that failed for RE reasons, upon running EDBC and authorizing the reinstatement, the system will generate the CF 377.1 CF Approval NOA if the CFHH is eligible to CF and the CF 377.1A CF Denial if the CFHH is not eligible to CF.
5. During a Partial Approval scenario, if a person is denied for Reinstatement of CalFresh Benefits for multiple reasons during a mixed approval scenario, all those reasons will display on the CF 388 (7/24) Notice.
6. The CalFresh Budget being added with this effort will replace the old CalFresh Budget (BUDGET_CF_APPROVAL_SAR_EN.xdp)
7. CA-259395 will update the reason fragments which generate on the CF 388 to include the state issued verbiage "The following individual(s) are ineligible because:". We will be using the updated verbiage on the CF 388 (7/24) Notice.
8. The Forms in the Template Repository must be manually filled out by case workers. The NOAs are automated Notices which will be automatically populated and sent out.
9. The NA Back 9 will be included on the back of the first page of all Notices.
10. The Non-Discrimination statement will be the last page on the Notice.
11. The CF 389 Notice states "Denied for Reinstatement for CalFresh". The Program Status will be discontinued, not denied.
12. If 2 Reasons are generated on one NOA, but one Reason is available in a threshold language and one Reason is not, two notices will generate. One in the Threshold Language with the applicable reason, and one in English for the applicable Reason.
- 13.

Technical Note: Merge logic will handle multiple reason on one NOA.

14. There are inconsistencies on the Budget and Non-Discrimination Statement on the Budget and Non-discrimination statement shown on the State Published Mockups for threshold languages. Therefore, the Budget and Non-Discrimination statement will be implemented for threshold languages as they appear on the State Published CF 377.4 SAR (8/24) Notice.

2 RECOMMENDATIONS

2.1 Update the Reason Fragment that generate on the CF 377.1 (8/24) Mixed Approval Notice to also generate on the CF 388 (7/24) Notice

2.1.1 Overview

There are reason Fragments that generate on the CF 377.1 (8/24) Notice which is used for CalFresh Mixed Approvals for non-Reinstatement Scenarios. These Reason Fragments will also be applicable on the CF 388 (7/24) Notice and will be updated to generate on the CF 388 (7/24) Notice when a household is applying for Reinstatement to CalFresh.

Reason Fragment Name/ID: See Supporting Document #7

State Form/NOA: CF 388 (7/24)

Current Program(s): CalFresh

Current Action Type: Restoration

Current Fragment Level: Program

Currently Repeatable: N

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

2.1.2 Form/NOA Verbiage

2.1.3 Update Fragment XDP

There will be no updates to Fragment XDP.

Note: CA-295395 made updates to these fragment verbiages. The updated verbiage should be used on the CF 388 (7/24).

Updated Languages:

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

Note: Not all reasons generate in the languages listed above. Please see Supporting document #7 for Languages per Reason.

NOA Mockups/Examples: See Supporting Documents #1, 2, & 3

1. Add Fragment Regulations

There will be no updates to Fragment Regulations

2. Update NOA Title and Footer Reference for Updated Reason

The NOA Footer should be updated to the most recent state version – CF 388 (7/24). There will be no other updates to Title and Footer.
Standard CalFresh Title, Reference, and Footer

Updated NOA Title: NOTICE OF APPROVAL OF REINSTATEMENT

NOA Footer Requires Translations: N

Updated NOA Footer: CF 388 (7/24)

NOA Footer Requires Translations: N

2.1.4 Form/NOA Variable Population

There will be no updates to Fragments Variable Population

Note: CA-295395 made updates to these fragment Variable Population. The updated variable population should be used on the CF 388 (7/24).

Variables Requiring Translations: None

2.1.5 Form/NOA Generation Conditions

2.1.6 Updates to Fragment Generation

The reasons in supporting document #7 should generate on the CF 388 (7/24) when a household has been approved for Reinstatement of CalFresh Benefits, but an individual in the household has not been approved for

Reinstatement of CalFresh Benefits. All other triggering conditions should remain the same.

A Reinstatement scenario occurs when:

1. Previously, the household was discontinued for CalFresh.

Technical Note: There is at least one existing CalFresh EDBC for the previous Benefit month and in the most recent saved CalFresh EDBC for that month the household was discontinued from 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 Benefit month and in the most recent saved CalFresh EDBC for the previous Benefit month the household was discontinued from CalFresh.

There is no restrictions on how far back you can rescind. If a case was discontinued in January, you can rescind that discontinuance in April.

2. The program was rescinded using any of the Rescind Reasons except for the RE Rescind Reasons.
3. In the Current EDBC the program is approved for Reinstatement for CalFresh Benefits

Note: If the CF 388 (7/24) Generates the CF 377.1 (8/24) and CF 377.4 SAR should not generate.

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.

Technical Note: The CF 388 (7/24) 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. The CF 377.1, CF 377.1A, and CF 377.4 SAR should be suppressed if a CF 388 generates.

Technical Note: The Reason Fragment CF_AP_CF_RESTRESTR_AP_F902, ID: 6122 (see recommendation 2.3), should be suppressed if any of these reason fragments generate.

New Program Generation: N

New Action Type: N

Update to Fragment Level: Y

Repeatable: N

Ordering on NOA: These Reason Fragments will come after the Action Fragment CF_AP_ACTION4 (ID: 4003).

Action Fragment: These Reason should generate with the CF_AP_ACTION4 (ID: 4003) Action Fragment.

Message Fragment: These Reason Fragments should generate with the new message added in Recommendation 2.4.

2.2 Update the Action Fragment CF_AP_ACTION4 (ID: 4003) with Reinstated CalFresh Benefit Period Details and a list of individuals approved for Reinstated CalFresh Benefits

2.2.1 Overview

This recommendation will move the Reinstated CalFresh Benefit details from the old CF 388 Reason Fragment CF_AP_CF_RESTR_AP_F902 (ID: 6122) into the Action Fragment CF_AP_ACTION4 (ID: 4003). This recommendation will also add a list of individuals approved for Reinstatement to CalFresh Benefits.

Action Fragment Name/ID: CF_AP_ACTION4 (ID: 4003)

State Form/NOA: CF 388 (7/24)

NOA Template: CF_NOA_TEMPLATE

Program(s): CalFresh

Action Type: Approval

Fragment Level: Person

Repeatable: N

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

2.2.2 Form/NOA Verbiage

Fragment XDP

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

Description	Previous Text	Updated Text	Formatting*
Static	YOUR CALFRESH BENEFITS HAVE BEEN RESTORED EFFECTIVE <ComplyDate>.	Your household's CalFresh benefits have been reinstated effective	Arial, Size 10

		<RESTORATION_DATE> for the following individual(s): <AP_PERSONS_LIST>	
Static		This is the date we got the information needed to reinstate your benefits. Your certification remains the same and ends on <CFRecertificationDate>.	Arial, Size 10

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

2.2.3 Form/NOA Variable Population

1. Add Fragment Variable Population

This fragment will only have one variable which is filled with the name of the person who is not eligible for reinstatement.

Variable Name	Population	Formatting*
<RESTORATION_DATE>	<p>The date the CalFresh benefits are reinstated to. For example, if the user did a SAR 7 restoration of aid with prorated benefits from 01/05/2025, the notice would display the date as "01/05/2025".</p> <p>If the user rescinded the CF as of the 1st of January, the date would display as "01/01/2025".</p> <p>MM/DD/YYYY le: "01/05/2025"</p>	Arial, Size 10
<AP_PERSONS_LIST>	<p>List of individuals in the household who are eligible for Reinstated CalFresh benefits. The format should be "FirstName LastName".</p> <p>For Example: "John Smith, Jane Smith, Jackson Smith"</p> <p>Technical Note: Names should be separated by a comma, not a line</p>	Arial, Size 10
<CFRecertificationDate>	Last day of the CalFresh RE Due Month. Example, If the CFHH's RE is	Arial, Size 10

	<p>due in December 2025, the notice would display as "12/31/2025".</p> <p>MM/DD/YYYY</p> <p>le: "12/31/2025"</p>	
--	--	--

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

Variables Requiring Translations: None

2.2.4 Form/NOA Generation Conditions

1. Add Fragment Generation

High Level: This Fragment will generate on all CF 388 (7/24) Notices. The CF 388 (7/24) will either generate as a Mixed Approval or a Full Approval.

Mixed Approval Scenario:

If the household was approved for CalFresh Reinstatement, 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 Reinstatement CalFresh, this Action Fragment will generate with the reason fragment CF_AP_CF_RESTRESTR_AP_F902 (ID: 6122).

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 Update the Reason Fragment CF_AP_CF_RESTRESTR_AP_F902 (ID: 6122) to only be used for full approvals for Reinstatement of CalFresh.

2.3.1 Overview

This Fragment will be updated to only generate on the CF 388 (7/24) for full approval scenarios. The reason fragments listed on supporting document #7 will be used for Mixed Approval Scenarios.

Reason Fragment Name/ID: CF_AP_CF_RESTR_AP_F902 (id: 6122)

State Form/NOA: CF 388 (7/24)

Current Program(s): CalFresh

Current Action Type: Restoration

Current Fragment Level: Program

Currently Repeatable: N

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

2.3.2 Form/NOA Verbiage

2.3.3 Update Fragment XDP

This fragments verbiage will be moved to the CF_AP_ACTION4 Action Fragment. See Recommendation 2.2.

Description	Text	Updated Text	Formatting*
static	This is the date we got the needed information to restore your benefits. Your certification remains the same and ends on <CFRecertificationDate>. If nothing changes you will get: <RestorationMonthAmount> for <RestorationMonth> for <NumberEligiblePeople> person(s).		Arial, Size 10

2.3.4 Form/NOA Variable Population

There will be no updates to Fragment Variable Population.

Variables Requiring Translations: None

2.3.5 Form/NOA Generation Conditions

2.3.6 Updates to Fragment Generation

This Fragment will be updated to only generate household has been approved for Reinstated CalFresh Benefits, with the following generation conditions:

1. Previously, the household was discontinued for CalFresh.

Technical Note: There is at least one existing CalFresh EDBC for the previous Benefit month and in the most recent saved CalFresh EDBC for that month the household was discontinued from 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 discontinued from CalFresh.

2. The program was rescinded using any of the Rescind Reasons except for the RE Rescind Reasons.
3. In the Current EDBC the program is approved for CalFresh

Note: All other notices should be suppressed if the CF 388 generates.

Ordering on NOA: This Reason Fragments will come after the Action Fragment CF_AP_ACTION4 (ID: 4003). It will be second on the Noa.

Action Fragment: This Reason should generate with the CF_AP_ACTION4 (ID: 4003) Action Fragment.

Message Fragment: These Reason Fragment should generate with the CF_AP_MESSAGE5 Fragment.

New Program Generation: N

New Action Type: N

Update to Fragment Level: Y

Repeatable: N

2.4 Adding the CalFresh Benefit details as a Message Fragment

2.4.1 Overview

This recommendation will add the specifics of the households reinstated CalFresh benefits as a new Message Fragment. This will replace the old message fragment CF_AP_MESSAGE1 (id: 5000).

State Form/NOA: CF 388 (7/24)

NOA Template ID(s): CF_APPROVAL_TEMPLATE

Program(s): CalFresh

Action Type: Approval

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

Create Fragment XDP

NOA Mockups/Examples: See Supporting #1, 2, & 3

Description	Text	Formatting*
static	You will get \$<Reinstatement_Month_Allotment> for the period of <REINSTATMENT_DATE> to <LAST_DAY_REINSTATMENT_MONTH>. Beginning <DATE_AFTER_RESTORATION>, you will get \$ <FULL_REINSTATED_BENEFIT_ALLOTMENT > monthly. These benefits will be available on your Electronic Benefit Transfer (EBT) card.	Arial, Size 10
static	You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is \$<IRT_THRESHOLD>.	Arial, Size 10
static	The amounts used to figure your CalFresh are shown on this notice.	Arial, Size 10

*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*
<Reinstatement_Month_Allotment>	CalFresh Allotment for the month the household was approved for Reinstatement. le \$"100.00" See edbc.authorized_amount	Arial, Size 10
<REINSTATEMENT_DATE>	The date the CalFresh benefits are restored to. Example 1: If the user did a SAR 7 restoration of aid with prorated benefits from 01/05/2025, the notice would display the date as "01/05/2025". Example 2: If the user rescinded the CF as of the 1 st of January, the date would display as "01/01/2025". Format: MM/DD/YYYY	Arial, Size 10
<LAST_DAY_ REINSTATEMENT _MONTH>	Last day of the first month of reinstatement's Example, if the CF was restored as of 01/05/2025, then the last day would be "01/31/2025". Format: MM/DD/YYYY	Arial, Size 10

<DATE_AFTER_RESTORATION>,	<p>The first day of the month after the reinstatement month.</p> <p>For Example, the CF benefits were reinstated as of 01/05/2025. The first day of the month after the reinstatement month would be "02/01/2025"</p> <p>Format: MM/DD/YYYY</p>	Arial, Size 10
<FULL_REINSTATED_BENEFIT_ALLOTMENT>	<p>Full CalFresh Benefit amount</p> <p>le: "\$150.00"</p> <p>If next months authorized amount is available, populate with edbc.authorized_amount for the month after the EDBC was ran.</p> <p>Technical Note: If next months authorized amount is not available, then populate with current months edbc.full_benefit_amount</p>	Arial, Size 10
IRT_THRESHOLD	<p>Populates with the households current IRT Threshold.</p> <p>See fs_budget.new_irt_limit_amt</p>	Arial, Size 10

1. Add Fragment Generation

This will always be generated with the action fragment CF_AP_ACTION4. This message will replace the old message fragment CF_AP_MESSAGE1 (id: 5000).

Location on NOA: In a mixed approval scenario, this fragment will generate after the Reason Fragments included in section 2.1. If everyone in the household is eligible for Reinstatement, this fragment will generate after the CF_AP_ACTION4.

2.5 Add a new Action Fragment for the Denial of Reinstatement of CalFresh Benefits

2.5.1 Overview

This recommendation will add a new action fragment to be used on the CF 389 Notice of Denial of Reinstatement to inform the household that their application for Reinstatement of CalFresh benefits has been denied

State Form/NOA: CF 389 (7/24)

NOA Template: CF_NOA_TEMPLATE

Program(s): CalFresh

Action Type(s): Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: None

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

2.5.2 Form/NOA Verbiage

Create Fragment XDP

This fragment will inform the household they have been denied for Reinstatement of CalFresh

NOA Mockups/Examples: See Supporting Documents #4

Description	Text	Formatting*
Static	Denial:	Arial, Size 10, Bold
Static	Your household's reinstatement of CalFresh benefits has been <u>denied</u> because:	Arial, size 10 The word "denied" should be bolded and underlined

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

2.5.3 Form/NOA Generation Conditions

1. Add Fragment Generation

This fragment will generate with any of the Reason Fragments included in supporting document #8.

Ordering on NOA: This will be the first fragment on the Notice.

2.6 Update CalFresh Non-RE Denial Reasons to generate on the CF 389 (7/24) Notice

2.6.1 Overview

This recommendation will update the CalFresh Non-RE Denial Reasons to generate on the CF 389 (7/24) in addition to the CF 377.1A (8/24). RE Denial Reasons will continue to generate on the CF 377.1A(8/24), but if the CF 389 (7/24) Notice is generated the CF 377.1A (8/24) Notice should not generate.

Fragment Name/ID: See supporting document #8

State Form/NOA: CF 389 (7/24)

NOA Template: CF_NOA_TEMPLATE

Program(s): CalFresh

Action Type(s): Denial

Fragment Level: Program

Repeatable: N

Include NA Back 9: Y

Forms/NOAs Generated with this NOA: None

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

2.6.2 Form/NOA Verbiage

There will be no updates to fragment verbiage.

3. Add NOA Title and Footer Reference for updated Reasons

The NOA Footer should be updated to the most recent state version – CF 389(7/24). There will be no other updates to Title and Footer.

Standard CalFresh Title, Reference, and Footer

Updated NOA Reference on Document List Page: Use standard CalFresh Reference

Technical Note: Use same reference used from CF 377.1A Population.

Updated NOA Title: NOTICE OF DENIAL FOR REINSTATEMENT

NOA Title Requires Translations: N

NOA Footer: CF 389 (7/24)

NOA Footer Requires Translations: N

2.6.3 Form/NOA Generation Conditions

2. Add Fragment Generation

The Fragments listed in supporting document #8 should be updated to generate on the CF 389 when the household is not eligible for Reinstatement to CalFresh. All other triggering conditions should remain the same.

Note: These fragments should still generate on the CF 377.1A (8/24) when the household is not applying for Reinstatement.

A Denial for Reinstatement occurs when:

1. Previously, the household was discontinued for CalFresh.

Technical Note: There is at least one existing CalFresh EDBC for the previous Benefit month and in the most recent saved CalFresh EDBC for that month the household was discontinued from 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 discontinued from CalFresh.

2. The program was rescinded using any of the Rescind Reasons except for the RE Rescind Reasons.
3. In the Current EDBC the program is discontinued from CalFresh.

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

Technical Note: No other notices should generate when the CF 389 (7/24) generates. The CF 377.1, CF 377.1A, and CF 377.4 SAR should be suppressed.

Ordering on Noa: These fragments will generate second on the NOA

Action Fragment: These Reasons Fragments will generate with the Action Fragment listed in recommendation 2.5.

Message Fragment: These Reason Fragments will generate with the new Message fragment being added in Recommendation 2.7.

2.7 Add a new CalFresh Message Fragment to generate on the CF 389 (7/24)

2.7.1 Overview

This recommendation will add a new Message Fragment to be generated on the CF 389 (7/24) that will inform the household they are able to reapply to CalFresh Benefits at any time.

State Form/NOA: CF 388 (7/24), CF 389 (7/24)

NOA Template: CF_NOA_TEMPLATE

Program(s): CalFresh

Action Type(s): Denial

Fragment Level: Program

Repeatable: N

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

2.7.2 Form/NOA Verbiage

NOA Mockups/Examples: See Supporting Documents #4

Description	Text	Formatting*
static	If you still want CalFresh benefits, you may reapply at any time.	Arial, Size 10, Bold

2.7.3 Form/NOA Generation Conditions

3. Add Fragment Generation

This Fragment will generate with any of the Reasons listed in recommendation 2.6 when they generate on the CF 389 (7/24).

Ordering on NOA: This will come third on the NOA, after the reason fragments in recommendation 2.6.

2.8 Update the CF 388 Form in the Template Repository to the most Recent State Version

2.8.1 Overview

This recommendation will update the CF 388 Form in the Template Repository to the most recent state version (7/24).

State Form: CF 388 (7/24)

Current Programs: CalFresh

Current Attached Form(s): None

Current Forms Category: Notice

Current Template Repository Visibility: All

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

2.8.2 Form/NOA Verbiage

Update Form XDP

Form Mockups/Examples: See Supporting Documents #5

This effort will add the CalFresh Budget, Explanation of Two Food Benefit Programs, Non-Discrimination Statement, and update the Forms verbiage to be in line with the most recently published state version: CF 388 (7/24).

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

2.8.3 Form/NOA Variable Population

See Supporting Document #9 for details.

* Note: The Editable column of the table above refers to if the variable will be editable when populated. When generating a Blank Form from Template Repository the field will be editable unless otherwise indicated.

Variables Requiring Translations: None

2.8.4 Form/NOA Generation Conditions

There will be no updates for Form Generation Conditions

1. Add/Update Form to Template Repository

This form should be updated in the Template Repository to the most recent version. The footer should be updated to reflect the new revision date (7/24) as described in the Fragment XDP section.

2.9 Update the CF 389 in the Template Repository to the most recent state version

2.9.1 Overview

This recommendation will update the CF 389 Form in the Template Repository to the most recent state version (7/24).

State Form: CF 389 (7/24)

Current Programs: CalFresh

Current Attached Form(s): None

Current Forms Category: Notice

Current Template Repository Visibility: All

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

2.9.2 Form/NOA Verbiage

Update Form XDP

Form Mockups/Examples: See Supporting Documents #6

This effort will add the CalFresh Budget, Explanation of Two Food Benefit Programs, Non-Discrimination Statement, and update the Forms footer to be in line with the most recently published state version: CF 389 (7/24).

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

2.9.3 Form/NOA Variable Population

See Supporting Document #10 for details.

2.9.4 Form/NOA Generation Conditions

There will be no updates for Form Generation Conditions

2. Add/Update Form to Template Repository

This form should be updated in the template repository to the most recent version. The footer should be updated to reflect the new revision date (7/24) as described in the Fragment XDP section.

2.10 Generate the CalFresh Budget and Explanation of Two Food Benefit Programs on the CF 388 and CF 389.

2.10.1 Overview

This recommendation will update the generation condition of the CalFresh Budget and Explanation of Two Food Benefit Programs to generate on the CF 388 and CF 389 Notices.

State Form: CF 389 (7/24), CF 388 (7/24)

NOA Template: CF_NOA_TEMPLATE, CF_AP_TEMPLATE, CF_DN_TEMPLATE

Current Programs: CalFresh

Current Attached Form(s): None

Current Forms Category: Notice

Current Template Repository Visibility: All

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

2.10.2 Form/NOA Verbiage

Update Form XDP

Form Mockups/Examples: See Supporting Documents #1,2,3,4

This effort will not update fragment or template verbiage.

2.10.3 Form/NOA Variable Population

There will be no updates to Fragment Variable Population.

2.10.4 Form/NOA Generation Conditions

CF 388 (7/24)

The CalFresh Budget and Explanation of Two Food Benefit Programs should generate on the CF 388 with the CF_AP_CF_RESTR_AP_F902 (id: 6122) Reason Fragment or any of the reasons included in Recommendation 2.1.

CF 389 (7/24)

The CalFresh Budget and Explanation of Two Food Benefit Programs should generate on the CF 389 with any of the Reason Fragments included in Supporting document #7.

Technical Note: For the CF 389, only generate the CalFresh Budget and Explanation of Two Food Benefit Programs if the Budget is available in the EDBC.

Technical Note: The New CalFresh budget being turned on in this recommendation (added to the NOA template as part of CA-265360) will replace the old CalFresh Budget (BUDGET_CF_APPROVAL_SAR_EN.xdp).

2.11 Generate the Non-Discrimination Statement on the CF 388 and CF 389.

2.11.1 Overview

SCR CA-265360 added the Non-Discrimination Statement to the CalFresh NOA templates, but they will only generate on the CF 377.1, CF 377.1A, and CF 377.4 SAR. This effort will make it so that the Non-Discrimination Statement generates on the CF 388 and CF 389 as well.

State Form: CF 389 (7/24), CF 388 (7/24)

NOA Template: CF_NOA_TEMPLATE, CF_AP_TEMPLATE, CF_DN_TEMPLATE

Current Programs: CalFresh

Current Attached Form(s): None

Current Forms Category: Notice

Current Template Repository Visibility: All

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

2.11.2 Form/NOA Verbiage

Update Form XDP

Form Mockups/Examples: See Supporting Documents #1,2,3,4

This effort will not update fragment or template verbiage.

2.11.3 Form/NOA Variable Population

There will be no updates to Fragment Variable Population.

2.11.4 Form/NOA Generation Conditions

CF 388 (7/24)

The CalFresh Non-Discrimination Statement should generate on the CF 388 with the CF_AP_CF_RESTRA_F902 (id: 6122) Reason Fragment or any of the reasons included in Recommendation 2.1.

CF 389 (7/24)

The CalFresh Non-Discrimination Statement should generate on the CF 389 with any of the Reason Fragments included in Supporting document #7.

2.12 Suppress all other CalFresh Notices for the month the CF 389 Generates

2.12.1 Overview

When the CF 389 Automated Denial for Reinstatement of CalFresh Notice generates all other CalFresh notices that would otherwise generate should be suppressed for that month.

2.12.2 Description of Change

When the Denial for Reinstatement Reason Fragments included in Supporting Document #7 generate on the CF 389 (7/24) notice, all other CalFresh Notices should be suppressed for that month.

2.13 Suppress the CF 377.1 General Approval Notice for Non-RE Rescind scenarios

2.13.1 Overview

The only time a CF 377.1 should be generated for rescind scenarios is when an RE rescind reason was used to rescind the discontinuation. Therefore, the CF 377.1 General Approval Notice should be suppressed whenever any Non-RE Reasons were used to rescind the discontinuance.

Reason Fragment Name/ID: F900A (id: 6120)

State Form/NOA: CF 377.2 (8/24)

Current Program(s): CalFresh

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages: English, Spanish

2.13.2 Overview of Changes

The CF 377.1 General approval NOA (F900A, id: 6120) should be suppressed whenever a CF 388 should generate.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	Mockup of the automated CF 388 Notice where everybody in the household is eligible for Reinstatement	CF_388_NOTICE_FULL_APPROVAL.pdf

2	NOA	Mockup of the automated CF 388 Notice where someone in the household is not eligible for Reinstatement	CF_388_NOTICE_TWO_DENIED_ONE_REASON.pdf
3	NOA	Mockup of the automated CF 388 Notice where multiple members of the household are not eligible for Reinstatement	CF_388_NOTICE_MULTIPLE_DENIED_MULTIPLE_REASONS.pdf
4	NOA	Mockup of the CF 389 Automated Notice with an example Reason for Denial	CF_389_AUTOMATED_NOTICE.pdf
5	Form	Mockup of the CF 388 which will be added to the Template Repository	CF_388_Form.pdf
6	Form	Mockup of the CF 389 Form which will be added to the template repository	CF_389_Form.pdf
7	NOA	List of all the Denial Reasons that	CF 388 Mixed Approval Reasons.xlsx

		currently generate on the Mixed Approval CF 377.1. These Reasons will now generate on the CF 388 when applicable.	
8	NOA	List of all the Non RE Denial Reasons which will generate on the CF 889 moving forward.	CF 389 Non RE Denial Reasons.xlsx
9	Form	Variable population for the updated CF 388 (7/24) Form in the Template Repository	CF388_Variable_Population.xlsx
10		Variable population for the updated CF 389 (7/24) Form in the Template Repository	CF389_Variable_Population.xlsx

Design

CA-252117

Allow HSP for Closed CW Program

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Content Revision 1 Updated Section 1 and 2 to remove recommendations

Andrea Rodriguez

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2.1

Content Revision 2 Added 2.5 Payment Request Skip Issuance section

Nick Pasin

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CA-252117 – Allow HSP for Closed CW Program

1 OVERVIEW

This SCR will update the system to continue to provide Housing Support Program (HSP) benefits for months when CalWORKs is inactive.

1.1 Current Design

~~The Housing Support Detail page does not display a "Created On" field when a HSP flag has been set.~~

The system currently does not allow Housing Support Program benefits for months when CalWORKs is inactive as required by WIC 11330.5 (h). The Housing Support Detail page cannot be saved to a status of "Pending" or "Active" for HSP when the CW Program has been discontinued due to excess income. HSP is allowable when the discontinuance reason is "Over Income". When attempting to save a "Pending" or "Active" status for HSP when the CW Program is discontinued the System generates a validation: "Status – The CalWORKs program must be Active to set the Housing Support Program to Pending or Active."

The Housing Support Detail page does not have the ability to list the housing situation at exit when a discontinued status is entered. This prevents the county from using this page to track needed discontinuance information for completion of the HSP 14 Report.

1.2 Requests

~~Update the Housing Support Detail page to display a "Created On" field.~~

Regulations state counties may continue to provide Housing Support to a recipient who is discontinued because the recipient no longer meets the income eligibility requirements. Update the Housing Support Detail page to remove the "Status – The CalWORKs program must be Active to set the Housing Support Program to Pending or Active." hard validation and allow HSP status of "Pending" and "Active" to be saved when the CW program is "Pending", "Active", "Discontinued", or "Denied."

Update Housing Support Detail Page when status of "Discontinued" is selected to include the following mandatory fields:

1. The "Housing Situation at Exit" (align with HSP 14 Report) field will contain the following options in the listed order:
 - i. Family is in permanent housing and is not receiving a subsidy
 - ii. Family is in permanent housing and is receiving a subsidy
 - iii. Family retained permanent housing after receipt of judgement for eviction, as ordered by the court
 - iv. Family is sharing housing with relatives/friends

- v. Family is in a shelter or nighttime residence that is a supervised publicly or privately operated shelter
 - vi. Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings
 - vii. Family has unknown housing situation
 - viii. Family has other housing situation
2. The "Housing Status at Exit" will field will contain the following options: 'Permanent' and 'Not Permanent.'
- i. 'Permanent' will be the only option available when a. 'Family is in permanent housing and is not receiving a subsidy', b. 'Family is in permanent housing and is receiving a subsidy', or c. 'Family retained permanent housing after receipt of judgement for eviction, as ordered by the court' is selected on the "Housing Situation at Exit" field.
 - ii. 'Not Permanent' will be the only option available when e. 'Family is in a shelter or nighttime residence that is a supervised publicly or privately operated shelter' or f. 'Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings' is selected on the "Housing Situation at Exit" field.
 - iii. Both options will be available when d. 'Family is sharing housing with relatives/friends', g. 'Family has unknown housing situation', or h. 'Family has other housing situation' is selected on the "Housing Situation at Exit" field.

Display 'Edit' buttons on the Housing Support List and Detail pages that will allow for updates to be made to certain fields. Apply security rights to the editing functionality.

1.3 Overview of Recommendations

1. Update the Housing Support List and Detail pages to include the following functionality
 - a. ~~Display 'Created On' information for the associated record.~~
 - b. Allow HSP benefits when CalWORKs is 'Active', 'Discontinued', 'Pending,' or 'Denied' on the case.
 - c. Display additional fields when a status of 'Discontinued' is selected.
 - d. Allow for editing Housing Support Detail record information.
2. Allow issuance of HSP benefits for closed CalWORKs cases.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically stated by this document.
2. The options listed on the 'Housing Situation at Exit' field reflect the options currently available on the HSP 14 as of the SCR release date.
3. CA-213280 will make updates related to the HSP 14 report.
4. The Housing Support Detail pages utilize Effective Dating on the Begin Date and End Date fields to ensure continuity between HSP Statuses. Creating a new Housing Support Detail record can modify the time frame of existing HSP Statuses. The Effective Dating Confirmation List page will display after pressing the Save and Return button when an existing record is being altered.

5. The duration of HSP payments is limited by the Begin Date and End Date entered for an Active HSP program.

2 RECOMMENDATIONS

This SCR will update the Housing Support List and Detail pages to allow for editing existing Housing Support records and allow Housing Support Program benefits during months when CalWORKs is inactive.

2.1 Housing Support Detail

2.1.1 Overview

The Housing Support Detail page allows the worker to add new status information for the Housing Support Program. This SCR will update the page to display ~~created by information~~ and new mandatory fields when the status is set to 'Discontinued'. Currently, workers are unable to directly edit or remove existing records, but existing records may be updated through the Effective Dating Confirmation List when creating a new record. This SCR will update the page to support editing and allow for Housing Support Program benefits when CalWORKs is not active.

2.1.2 Housing Support Detail Mockup

Housing Support Detail

*- Indicates required fields

Status: *
Pending

Begin Date: * 01/01/2025 **End Date:**

Request Date: *
01/01/2025

Edit Close

Edit Close

Last Updated On 01/01/2025 8:00:00 AM By: [1234567](#)

Figure 2.1.1 – Housing Support Detail (View Mode)

Housing Support Detail

*- Indicates required fields


Save and Return Cancel


Status: *
Discontinued ▼

Status Reason: *
Family has other reason for exiting ▼

Housing Situation at Exit: *
Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings ▼

Housing Situation: *
Not Permanent ▼

Begin Date: *
02/01/2025 

End Date:


Request Date: *
01/01/2025 ▼

Save and Return Cancel

Figure 2.1.2 – Housing Support Detail with ‘Discontinued’ Status (Create Mode)

Housing Support Detail

*- Indicates required fields

Save and Return Cancel

Status: *
Discontinued

Status Reason: *
Family has other reason for exiting ▼

Housing Situation at Exit: *
Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings ▼

Housing Situation: *
Not Permanent ▼

Begin Date:
02/01/2025

End Date:

Request Date: *
01/01/2025 ▼

Save and Return Cancel

Last Updated On 02/01/2025 8:00:00 AM By: [1234567](#)

Figure 2.1.3 – Housing Support Detail with ‘Discontinued’ Status (Edit Mode)

Housing Support Detail


*- Indicates required fields

Save and Return Cancel

Status: *
Pending

Begin Date: *
03/05/2025

End Date:
03/10/2025

Request Date: *
03/01/2025 

Save and Return Cancel

Last Updated On 03/10/2025 8:00:00 AM By: [1234567](#)

Figure 2.1.4 – Housing Support Detail with ‘Pending’ Status (Edit Mode)

2.1.3 Description of Changes

- ~~1. Update the Housing Support Detail page to display the "Created On" date information of the current Housing Support Detail record in View and Edit Mode.~~
 - ~~a. The information will display in the following format: "Created On [MM]/[DD]/[YYYY] [HH]:[MM]:[SS] [XM] By: [ID Number Link]" (where the ID Number links the user to the Worker Detail page for that ID Number).~~
 - ~~b. The information will display above the "Last Updated On" information.~~
2. Update the Housing Support Detail page to display additional dynamic fields only when the Status is set to 'Discontinued'.
 - a. The page will display the following drop-down fields
 - i. Housing Situation at Exit
 1. The drop-down will list the options in the following order:
 - a. Family is in permanent housing and is not receiving a subsidy
 - b. Family is in permanent housing and is receiving a subsidy
 - c. Family retained permanent housing after receipt of judgement for eviction, as ordered by the court
 - d. Family is sharing housing with relatives/friends
 - e. Family is in a shelter or nighttime residence that is a supervised publicly or privately operated shelter
 - f. Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings
 - g. Family has unknown housing situation
 - h. Family has other housing situation
 - ii. Housing Situation
 1. This field will display only when an option is selected on the Housing Situation at Exit field.
 2. The drop-down will list the following options
 - a. Permanent
 - i. This option will NOT display when the following options are selected on the Housing Situation at Exit field:
 1. Family is in a shelter or nighttime residence that is a supervised publicly or privately operated shelter
 2. Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings
 - b. Not Permanent
 - i. This option will NOT display when the following options are selected on the Housing Situation at Exit field:
 1. Family is in permanent housing and is not receiving a subsidy

2. Family is in permanent housing and is receiving a subsidy
 3. Family retained permanent housing after receipt of judgement for eviction, as ordered by the court.
- b. The fields will be mandatory when editing or creating a record that has a status of 'Discontinued' only. Existing records that do not have these fields currently populated will remain unchanged.
 Note: After the SCR is implemented, the worker will be required to update the new required fields to save the record going forward.
3. Update the Housing Support Detail page to allow for manually editing records after creation.
 - a. Display 'Edit' buttons in view mode.
 - i. The buttons will be protected by the 'HousingSupportDetailEdit' security right. They will not display for users without that security right.
 - b. The following fields can be modified in edit mode.
 - i. Status Reason
 - ii. Housing Situation at Exit
 - iii. Housing Situation
 - iv. Request Date
 1. When the Status is 'Pending', the user will be able to enter a date on an input field.
 2. When the Status is 'Active', 'Discontinued', or 'Denied', the user will select a date from a drop down containing all of the Request Dates that are currently associated to a Status.
 - c. The bottom of the page will display the "Last Updated On" date information of the current Housing Support Detail record in Edit Mode.
 - i. The information will display in the following format: "Last Updated On [MM]/[DD]/[YYYY] [HH]:[MM]:[SS] [XM] By: [ID Number Link]" (where the ID Number links the user to the Worker Detail page for that ID Number).
4. Update the save validations on the Housing Support Detail page.
 - a. Update save validations to allow for Housing Support during months when CalWORKS is inactive.
 - i. Remove the save validation message: "Status – The CalWORKs program must be Active to set the Housing Support Program to Pending or Active." This message displays when the user saves the Status field to 'Pending' or to 'Active' while the CalWORKs program on the case has a Status that is not currently 'Active.'
 - ii. Create a new save validation that will allow the worker to save the HSP page Status field to 'Pending' only when the CalWORKs program on the case has a program Status that is 'Pending', 'Active', 'Discontinued', or 'Denied'.
 1. The validation will display the following message: "Status – The CalWORKs program must be Active, Pending, Discontinued or Denied to set the Housing Support Program to Pending."

- iii. Create a new save validation that will allow the worker to save the HSP page Status field to 'Active' only when the CalWORKs program on the case has a program Status that is 'Pending', 'Active', 'Discontinued', or 'Denied'.
 1. The validation will display the following message: "Status – The CalWORKs program must be Active, Pending, Discontinued or Denied to set the Housing Support Program to Active."
 - b. Remove the save validation message: "Request Date – This date cannot be more than three months in the past." This message displays when the worker saves the Request Date for the record with a date more than three months prior to the system date.
 - c. Create a save validation when the worker saves the Request Date with a date prior to 05/01/2020.
 - i. The validation will display the following message: "Request Date – This date cannot be before 05/01/2020."
- Note: Existing validations will prevent the worker from entering a Begin Date prior to the Request Date.

2.1.4 Page Location

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

2.1.5 Security Updates

Note: HousingSupportDetailEdit is an existing security right. Housing Support Detail Edit is an existing security group.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
HousingSupportDetailEdit	Gives the user the ability to create and edit a Housing Support Detail record.	Housing Support Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Housing Support Detail Edit	Gives the user the ability to create and edit a Housing Support Detail record.	Eligibility Staff, Eligibility Supervisor

2.1.6 Page Mapping

Update page mapping to reflect the changes being made to the Housing Support Detail page.

2.1.7 Accessibility

This page has been assessed for accessibility requirements and meets accessibility standards.

2.1.8 Page Usage/Data Volume Impacts

N/A


2.2 Housing Support List


2.2.1 Overview

The Housing Support List page allows the worker to view and add Housing Support Program status information. Currently, existing records may be updated through the Effective Dating Confirmation List, and workers are unable to directly edit or remove existing records. This SCR will update the page to display 'Edit' buttons alongside listed Housing Support Detail records.

2.2.2 Housing Support List Mockup

Housing Support List

Display
From: 01/01/2025 

To: 


View


Program					
Status	Status Reason	Begin Date	End Date	Request Date	
Discontinued	Family entered another housing program	02/01/2025		01/01/2025	Edit
Active	Family's fixed nighttime residence is a shelter	01/05/2025	01/31/2025	01/01/2025	Edit
Active	Family is in receipt of judgement for eviction	01/02/2025	01/04/2025	01/01/2025	Edit
Pending		01/01/2025	01/01/2025	01/01/2025	Edit

Add Status

Figure 2.2.1 – Housing Support List with HousingSupportDetailEdit security right

Housing Support List

Display
From: 01/01/2025 

To: 

View

Program					
Status	Status Reason	Begin Date	End Date	Request Date	
Discontinued	Family entered another housing program	02/01/2025		01/01/2025	
Active	Family's fixed nighttime residence is a shelter	01/05/2025	01/31/2025	01/01/2025	
Active	Family is in receipt of judgement for eviction	01/02/2025	01/04/2025	01/01/2025	
Pending		01/01/2025	01/01/2025	01/01/2025	

Figure 2.2.2 – Housing Support List without HousingSupportDetailEdit security right

2.2.3 Description of Changes

1. Update the Housing Support List page to allow for manually editing records after creation.
 - a. Display an 'Edit' button at the end of each row for a Housing Support status record in the list.
 - i. Clicking the button will open the associated Housing Support Detail page in edit mode.
 - ii. The button will be protected by the 'HousingSupportDetailEdit' security right. It will not display for users without that security right.

2.2.4 Page Location

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

2.2.5 Security Updates

Note: HousingSupportDetailEdit is an existing security right. Housing Support Detail Edit is an existing security group.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
HousingSupportDetailEdit	Gives the user the ability to create and edit a Housing Support Detail record.	Housing Support Detail Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Housing Support Detail Edit	Gives the user the ability to create and edit a Housing Support Detail record.	Eligibility Staff, Eligibility Supervisor

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

This page has been assessed for accessibility requirements and meets accessibility standards.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Service Arrangement Detail

2.3.1 Overview

The Service Arrangement Detail page allows users to create a service arrangement for a requested supportive service need. This section will describe the changes to allow service arrangement detail page validations for HSP needs.

2.3.2 Service Arrangement Detail Mockup

Service Arrangement Detail

The mockup shows a form titled "Service Arrangement Detail". At the top right are two buttons: "Save and Return" and "Cancel". Below the title bar, there is a validation message in red text: "• **Payee** - The CalWORKs program is not Active, Pending, Denied, or Discontinued for a single day in the Arrangement period. Please adjust the dates." Below this message is a dark blue bar with the text "Need 🌸" in white.

Figure 2.3.1 – Service Arrangement Detail page with CalWORKs status validation

2.3.3 Description of Changes

1. Add existing Validation on Service Arrangement Detail Page to display for a Housing Support Program (HSP) service arrangement when CalWORKs program is NOT in the following status: Active, Pending, Denied or Discontinued.
 - a. "The CalWORKs program is not Active, Pending, Denied or Discontinued for a single day in the Arrangement period. Please adjust the dates."
 - i. If the program is not in any of the following – Active, Pending, Denied or Discontinued – for even a single date within the Service Arrangement period, then the program becomes ineligible to receive Housing Support Program (HSP) services.
 - ii. Existing validation logic for WTW and REP will not be affected
 - iii. Update validation message for WTW and REP to include Good Cause

2.3.4 Page Location

- **Global:** Eligibility / Employment Services
- **Local:** Customer Information/Supportive Services
- **Task:** Service Arrangements

2.3.5 Security Updates

No Change

2.3.6 Page Mapping

No Change

2.3.7 Accessibility

This page has been assessed for accessibility requirements and meets accessibility standards.

2.3.8 1.1.7 Page Usage/Data Volume Impacts

No Change

2.4 Payment Request Detail

2.4.1 Overview

The Payment Request Detail page allows user to create or approve a recipient's request for a supportive service. When creating/approving a request, users specify the Service Month for the request. This section will describe the changes to allow a payment request to be created or approved for Housing Support Program (HSP) services

2.4.2 Payment Request Detail Mockup

Payment Request Detail

*- Indicates required fields

Save Cancel

- Cannot Approve Payment Request for this Service Arrangement. The CalWORKs Program for Housing Support Needs must be Active, Pending, Denied or Discontinued during the Service Month.

Service Arrangement ID: 0000000000 Payment Request Number:

Service Arrangement Details		
Payee Name:	Case Name:	Case Number:
Name, Case 32M	Case Name	0000000
Program:	Funding Source:	Aid Code:
CalWORKs		

Figure 2.4.1 – Payment Request Detail page with CalWORKs status validation

Payment Request Detail

*- Indicates required fields

Save Cancel

- Cannot approve Payment Request for this Service Arrangement. WTW/REP Program for Housing Support Needs must be Active, Non-Comp, Good Cause or Exempt during the Service Month.

Figure 2.4.2 – Payment Request Detail page existing WTW/REP validation message updated to remove mention of CalWORKs program.

2.4.3 Description of Changes

1. Add new Validation on Payment Request Detail Page for Housing Support Program (HSP) when the Approve button is clicked to display when:
 - a. CalWORKs program is NOT in the following status: Active, Pending, Denied or Discontinued.
 - b. The Payment Request Benefit Month falls within the HSP need type's Begin Month and End Month range.
 - i. "Cannot Approve Payment Request for this Service Arrangement. The CalWORKs Program for Housing Support Needs must be Active, Pending, Denied or Discontinued during the Service Month."

2. Update existing Validation Message on Payment Request Detail Page for Housing Support Program (HSP) for WTW/REP when the Approve button is clicked.
 - a. "Cannot **approve** Payment Request for this Service Arrangement. WTW/REP Program for Housing Support Needs must be Active, Non-Comp, **Good Cause** or Exempt during the Service Month.
 - i. Current validation functionality for WTW and REP programs will not change. Only validation message is being updated to remove mention of CalWORKs program.

2.4.4 Page Location

- **Global:** Fiscal
- **Local:** Payment Requests
- **Task:** Payment Request Search

2.4.5 Security Updates

No Change

2.4.6 Page Mapping

No Change

2.4.7 Accessibility

This page has been assessed for accessibility requirements and meets accessibility standards.

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Payment Request Skip Issuance Logic

2.5.1 Overview

Current design for the Skip Issuance Logic for Payment Requests checks for an existing Redetermination/Recertification for the Payment Request Benefit month

2.5.2 Description of Change

Update the Skip Issuance Logic for payment requests to not require Redetermination/Recertification check for the HSP payments for CalWORKs program. This is to prevent skipped issuances occurring for HSP benefits for non-Active CalWORKs programs without a Redetermination/Recertification record.

2.6 Update the Nightly Payment Request Sweep batch job

2.6.1 Overview

The Nightly Payment Request Sweep batch job (PB00F305) finds Payment Requests that have been set to Approved status and then creates authorization records to be picked up by the Nightly Issuance Batch job.

2.6.2 Description of Change

1. Update the Nightly Payment Request Sweep for Housing Support Program payment requests to include Pending, Denied and Discontinued status for CalWORKs program.

2.6.3 Execution Frequency

No Change

2.6.4 Key Scheduling Dependencies

No Change

2.6.5 Counties Impacted

No Change

2.6.6 Failure Procedure/Operational Instructions

No Change

2.7 Automated Regression Test

2.7.1 Overview

Create new automated regression test scripts to verify the editability of the Housing Support Detail page, the Housing Situation at Exit and Housing Situation options available on this page during discontinuance, and the updated validation messages on the Service Arrangement Detail and Payment Request Detail pages.

2.7.2 Description of Changes

Create regression scripts to verify the following scenarios on each listed page.

Housing Support Detail:

1. ~~Verify that a 'Created On' value is displayed in view and edit modes.~~
2. Verify the following when setting the status to Discontinued in edit mode:
 - a. The 'Housing Situation at Exit' field displays with the following options available for selection in this order:
 - i. Family is in permanent housing and is not receiving a subsidy
 - ii. Family is in permanent housing and is receiving a subsidy
 - iii. Family retained permanent housing after receipt of judgement for eviction, as ordered by the court
 - iv. Family is sharing housing with relatives/friends
 - v. Family is in a shelter or nighttime residence that is a supervised publicly or privately operated shelter
 - vi. Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings
 - vii. Family has unknown housing situation
 - viii. Family has other housing situation
 - b. The 'Housing Situation' field displays once any 'Housing Situation at Exit' value has been selected:
 - i. 'Permanent' is a selectable option for all 'Housing Situation at Exit' values other than the following:
 1. Family is in a shelter or nighttime residence that is a supervised publicly or privately operated shelter
 2. Family is residing in a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings
 - ii. 'Not Permanent' is a selectable option for all 'Housing Situation at Exit' values other than the following:
 1. Family is in permanent housing and is not receiving a subsidy
 2. Family is in permanent housing and is receiving a subsidy
 3. Family retained permanent housing after receipt of judgement for eviction, as ordered by the court

Technical Note: The 'Housing Situation' options that are available for all 'Housing Situation at Exit' values should be verified.

Housing Support List:

3. Verify that an 'Edit' button is available for a previously saved Housing Support Detail record, and that clicking this button navigates the user to the Housing Support Detail page in edit mode.

Payment Request Detail:

4. Verify that the expected validation message displays when attempting to approve a payment request for 'Housing Support Program (HSP)' and:
 - a. The associated Welfare to Work program status is not Active, Non-Comp, **Good Cause**, or Exempt.

Technical Note: This scenario should be verified for one applicable program status value only. Verifying every status value is out of scope.

- b. The associated REP program status is not Active, Non-Comp, **Good Cause**, or Exempt.

Technical Note: This scenario should be verified for one applicable program status value only. Verifying every status value is out of scope.

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
3/31/2025	1.2	Content Revision 1 – Removed updates to reason fragments that do not result in the person/case failing CalFresh. See supporting document #1 & 6.	Brendan Mandyam
4/18/2025	2.0	Content Revision - Updated Variable Population for the Missing Verbiage (recommendation 2.4). Added new recommendation to turn off the Expedited Services Reason Fragment and Prorated Approval Reason Fragment (recommendation 2.7). Combined Supporting document #1 & 6 to make it easier to read. Removed NOA Reasons which do not have triggers (recommendation 2.1)	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
- 7 Turn off the Expedited Services and Prorated Services Notices
- 8 Update the CF 377.1 Approval Reasons to generate on the most recent CF 377.1 (8/24) Version
- 9 Update the CF 377.1 Full Approval Reason Fragment to generate for Prorated and Expedited Scenarios

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.
8. The CF 389 states that the households application for Reinstatement is denied. However, the program will end in a discontinued state, not a denied state. Previously the program was discontinued, then rescinded, and will return to the discontinued state if reinstatement is denied.
9. For NOAs in threshold languages, if multiple reasons generate on that NOA, but only one Reason is available in the required language, two notices will be sent. One NOA will have the reasons available in that threshold language, and an English NOA with the reasons not available in the threshold language

Technical Note: Merge Logic handles multiple reasons.
10. The State published budget and Non Discrimination statement do not match for threshold languages on the CF 377.1, CF 377.1A, and CF 377.4 SAR. The budget and Non-Discrimination statement will be implemented for threshold languages as they appear on the State Published CF 377.4 SAR (8/24) Notice.

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.

Note: Not all reasons including in Supporting document #1 will have verbiage updates, however all included reasons will be updated to generate with 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

Create Fragment XDP

See supporting document #1 for XDP Updates

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

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 #1.	Arial, Size 10

	<p>This variable should be updated to populate with a list of names, separated by comma instead of by line.</p> <p>For example: "John Smith, Jane Smith, Jackson Smith"</p>	
--	---	--

1. **Add Fragment Regulations**

There will be no updates to Fragment Regulations

2. **Add NOA Title and Footer Reference for new Reason**

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: There will be no updates to NOA references with this effort

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

Fragment Generation

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 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 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 individuals: <AP_LIST>	Static, Arial Size 10

2.2.3 Form/NOA Variable Population

3. Add Fragment Variable Population

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.	Arial, Size 10

	<p>This would be prorated if approval was not on the first day of the month.</p> <p>See edbc.authorized_amount for the current month</p>	
Month1	<p>The EDBC Benefit Month</p> <p>MM/YYYY</p> <p>For example, if benefits were approved on 01/01/2025 this field would be: "01/2025"</p>	Arial, Size 10
Full_benefit_amount	<p>The CalFresh authorized amount to be paid out monthly during the period below.</p> <p>If next months authorized amount is available, populate with edbc.authorized_amount for the month after the EDBC was ran.</p> <p>Technical Note: If next months authorized amount is not available, then populate with current months edbc.full_benefit_amount</p>	Arial, Size 10
SecondMonthOfCertification	<p>The first day of the second month in the certification period.</p> <p>MM/DD/YYYY</p> <p>For example, if benefits were approved on 01/01/2025 this field would be: 02/01/2025</p> <p>See edbc next benefit month begin date</p>	Arial, Size 10
CertificationEndDate	<p>Last day of the RE Due month.</p>	Arial, Size 10

	MM/DD/YYYY	
	For example: 12/31/2025	
	See re_due month in program summary.	
AP_PERSON_LIST	<p>List of members of the household who were approved for CalFresh Benefits.</p> <p>For Example: "John Smith, Jane Smith, Jackson Smith"</p> <p>Technical Note: Names should be separated by a comma, not a line</p>	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

Update Fragment XDP

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

Updates to Fragment Generation

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 #6.

These Reason Fragments should be updated to generate with CF_AP_ACTION8.

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 without another notice if your cash aid is approved.	Arial, Size 10

static		You must report whenever your household income goes above your Income Reporting Threshold (IRT). Your IRT is \$ <CurrentIrtLimit>.	Arial, Size 10
Dynamic_4		<p>BECAUSE YOU RECEIVED CALFRESH BENEFITS RIGHT AWAY, we did not require you to give us the following verification: <verifications></p> <p>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.</p>	<p>Arial, Size 10.</p> <p>“BECAUSE YOU RECEIVED CALFRESH BENEFITS RIGHT AWAY,” bold, arial size 10</p>
static	<p>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.</p>	<p>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.</p>	Arial, Size 10

2.4.3 Form/NOA Variable Population

Name	Population	Format
CurrentIrtLimit	Populates with the households current IRT limit. See edbc.current_irt_limit	Arial, size 10
Verifications	Populates with the predetermined verifications. See CF_AP_EXPEDITED_F903 for variable population	Arial, size 10
Verif_date	Populates with VERIF.DUE_DATE. If multiple verifications are missing, take the earliest due date. Format: MM/DD/YYYY	Arial, size 10

2.4.4 Form/NOA Generation Conditions

Fragment Generation Conditions:

This fragment should generate on all CF 377.1 (8/24) Notices.

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 th 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: No

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 #7

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 #5 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 #8 for updated Variable Population.

2.6.4 Form/NOA Generation Conditions

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

2.7 Turn off the Expedited Services CF 377.1 Approval Notice and the CF 377.1 Prorated Approval Notice

2.7.1 Overview

The CF 377.1 currently has a reason fragment for expedited approvals and a reason fragment for prorated approvals. Both those reason fragments should be turned off, with that functionality moving into the dynamic verbiage on the message fragment in recommendation 2.4.

Reason Fragment/ID: CF_AP_EXPEDITED_F903 (6343), BLANK (id: 6121)

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:

Note: The Prorated Approval NOA reason does not have any verbiage, and therefore does not have a Reason name associated, just an ID. The ID is 6121.

2.7.2 Description of Changes

The following reason fragments should be turned off and no longer generate on the CF 377.1 Notice:

CF_AP_EXPEDITED_F903 - ID: 6343

Prorated NOA Reason - ID: 6121

2.8 Update the CF 377.1 Approval Reasons to generate on the most recent CF 377.1 (8/24) Version

2.8.1 Overview

Recommendation 2.1 updated Denial reasons to generate on the CF 377.1 (8/24) Mixed Approval Notice and to generate with the updated CF_AP_ACTION8 Action Fragment and CF_AP_MESSAGE5 Fragment.

This recommendation will update the approval reasons to generate on the CF 377.1 (8/24) Approval Notice and to generate with the action Fragment CF_AP_ACTION8 and the message fragment CF_AP_MESSAGE5.

NOA Reference	Reason Fragment Name	Reason ID
SHELTER EXP NOT VERIF	CF_AP_SHLTR_EXPNS_NVRF_F303	6090
UTILITY EXP NOT VERIFIED	CF_AP_UTL_EXPNS_NVRF_F305	6092
MEDICAL EXP NOT VERIFIED	CF_AP_MC_EXP_NVRFD_F307	6095
DEP CARE EXP NOT VERIFIED	CF_AP_DEPCARE_EXP_NVRFD_F309	6096
LESS THAN \$10 BNFT/APP MNTH	CF_AP_LESS_10_BEN_F319	6098
SB1569 Approved - T Visa	CF_AP_SB1569_APPROVED_TVISA_F150	7234
SB1569 Approved - U Visa	CF_AP_SB1569_APPROVED_UVISA_F151	7235

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

2.8.2 Form/NOA Verbiage

Create Fragment XDP

There will be no updates to fragment verbiage.

2.8.3 Form/NOA Variable Population

4. Add Fragment Regulations

There will be no updates to Fragment Regulations

5. Add NOA Title and Footer Reference for new Reason

The NOA Footer should be updated to the most recent state version – CF 377.1 (8/24).

NOA Reference on Document List Page: There will be no updates to NOA references with this effort

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

2.8.4 Form/NOA Generation Conditions

Fragment Generation

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

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.

2.9 Update the CF 377.1 Full Approval Reason Fragment to generate for Prorated and Expedited Scenarios

2.9.1 Overview

Previously this Reason Fragment was used when a household had been approved for CalFresh for an entire month, and separate reason fragments were being used for prorated approvals and expedited approvals. Those reasons have been turned off, with their functionality being moved into CF_AP_MESSAGE5 and CF_AP_ACTION8.

This fragment should therefore be used for prorated and expedited scenarios in addition to full month approvals. The generation conditions for this fragment should be updated to generate whenever the household has been approved for CalFresh, whether it is full or partial month of approval.

Reason Name/ID: CF APPROVED, ID: 6120

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

2.9.2 Form/NOA Verbiage

Create Fragment XDP

There will be no updates to fragment verbiage.

2.9.3 Form/NOA Variable Population

6. Add Fragment Regulations

There will be no updates to Fragment Regulations

7. Add NOA Title and Footer Reference for new Reason

The NOA Footer should be updated to the most recent state version – CF 377.1 (8/24).

NOA Reference on Document List Page: There will be no updates to NOA references with this effort

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

2.9.4 Form/NOA Generation Conditions

Fragment Generation

The trigger conditions for this fragment should remain the same, however the condition for the household only being approved for the entire month should be removed.

This fragment should now generate when the household has been approved for CalFresh Benefits.

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.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	NOAs	List of all CF 377.1 Mixed Approval Denial Reasons and their updated verbiage. (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

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
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	Outdated Action Verbiage (recommendation 2.3) Technical Note: Contains Reason Fragments the action currently generates with.	Outdated Action Fragment.xlsx
7	NOAs	Contains Outdated Household Size verbiage and its corresponding Reasons. (see recommendation 2.5) Technical Note: Contains the reasons and actions that generate with the outdated message.	CF377.1 Outdated Message Fragment.xlsx
8	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



CA-276523

eHIT Disposition Processing Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Noel Acosta	
	Reviewed By	Renee Gustafson, Maksim Volf, Tisha Mutreja, Geetha Ramalingam, Sireesha Kommajosyula, William Baretzky	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/02/2025	.1	Initial Draft	Noel Acosta
01/07/2025	.5	Updated Mockups and Recommendations	Noel Acosta
01/17/2025	.7	Updated Mockups and split out the Manual Disposition functionality from Rec #2.2 to Rec #2.5 and #2.6	Noel Acosta
01/22/2025	.8	Updated Rec #2.7 to have a security detail	Noel Acosta
01/29/2025	.9	Updated validation messaging in Rec #2.7	Noel Acosta
01/30/2025	1.0	Added recommendation for the CalHEERS Disposition Status decode across pages	Noel Acosta
02/05/2025	1.1	Minor formatting/ verbiage corrections, added 'Eligibility Supervisor – LAC' Role to 2.5.5 and 2.7.5 security detail	Noel Acosta
02/10/2025	1.2	Minor formatting/verbiage updates, added assumption for Job Aids to be updated	Noel Acosta
02/20/2025	1.3	Minor clarifications, assumptions, and notes added/updated per feedback	Noel Acosta
02/28/2025	1.4	Updated 2.9 EHIT Disposition triggering conditions to specify being limited to Regular Accepted and Saved EDBC Runs and that CalFresh and CalWORKs EDBC Runs should not trigger a Disposition when the latest Valid DER for a case is a Renewal DER not in 'Complete' status. Added 2.9.2.g Testing Note	Noel Acosta
03/03/2025	1.5	Added page validations 2.6.3.5 and 2.6.3.6 to align with EHIT sections 2.9.2.f.i and 2.9.2.f.i.v	Noel Acosta
03/19/2025	1.6	Updated 2.9.2.1.c in EHIT to better handle Disposition Acknowledgement payloads from CalHEERS that have multiple eligibility nodes. Updated 2.6 Hard Validation mockups for formatting consistency	Noel Acosta

04/09/2025	2.0	Updated 2.8 MAGI Determination Summary page to resolve issue with multiple Dispositions per EDBC. Updated 2.9 EHIT to resolve issue with certain Status/Role combinations getting incorrectly communicated to CalHEERS and to expand IE/DS Reason logic and to specify the eligibility in Disposition for MAGI Pending DERs	Noel Acosta
04/11/2025	2.1	Removed 'Carry Forward Status' field from the 2.4.2.1 Mockup and the 2.4.3.1.e description table as this field is not being communicated in Disposition Acknowledgment Transactions from CalHEERS per the technical schema.	Noel Acosta
04/14/2024	2.2	Minor update to 2.9.2.3 to align with bullet b for the IE/DS Reason logic expansion	Noel Acosta

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CA-276523 – eHIT Disposition Processing Enhancements

1 OVERVIEW

CalSAWS generates a Disposition to CalHEERS based on the results of an EDBC run. The Disposition communicates to CalHEERS the current authorized Medi-Cal (and sometimes CalWORKs and CalFresh) eligibility in CalSAWS. CalHEERS uses the Disposition to update the corresponding person eligibility in their system accordingly.

Due to the way CalHEERS processes Dispositions today, eligibility between the two systems can become out of sync, leading to issues with transitions between Medi-Cal, Exchange, and Title XXI (MCAP/CCHIP) programs for consumers. This document will detail the CalSAWS enhancements to Disposition processing to support CalHEERS Change Request 253663 where CalHEERS will consume Disposition information based on effective date to keep in sync with CalSAWS and to prevent issues with program transitions for consumers.

1.1 Current Design

CalSAWS interfaces with CalHEERS via electronic Health Information Transfer (eHIT) to communicate application data, MAGI Medi-Cal eligibility, and eligibility to other Covered California Programs. eHIT transactions include an Eligibility Determination Request (EDR) from CalSAWS to CalHEERS, Determination of Eligibility Response (DER) from CalHEERS to CalSAWS, and a Disposition transaction sent from CalSAWS to CalHEERS. The Disposition communicates case and person linkage, CalSAWS worker information, referral processing status, and program eligibility information.

CalHEERS has a Business Rules Engine (BRE) where they run the application information, determine the eligibility and send to CalSAWS in a DER. CalSAWS then uses the DER in EDBC and based on the authorized eligibility, communicates back to CalHEERS with a Disposition. The program eligibility communicated in a Disposition includes Primary Aid Code, Program Type (MC, CF, CW), Program Status (Eligible, Ineligible, Discontinued), Begin and End Dates, and Override Reason code, if any.

CalSAWS creates a separate Disposition transaction per EDBC so multiple Dispositions may be sent to CalHEERS in response to a single DER.

CalSAWS will trigger a Disposition if the DER associated to the Accepted and Saved Regular Medi-Cal EDBC is in 'Reviewed' or 'Completed Manually' Status. The system then updates the DER status to 'Complete' once CalHEERS acknowledges receiving the Disposition transaction. If the DER associated to the EDBC is already in 'Complete' Status, then a Disposition will only be triggered again if a subsequent EDBC uses the same DER and there is a change in eligibility based on the prior Disposition sent to CalHEERS.

Once a Medi-Cal case is entirely Non-MAGI Medi-Cal, CalSAWS no longer sends Dispositions to CalHEERS to communicate further changes.

CalSAWS does not send Dispositions for the following:

- Case with any 'Minor Consent' Requested Medi-Cal Type
- Medi-Cal EDBC is run with 'Soft Pause/Non-RE' or 'Rescind' Run Reason
- Medi-Cal program is closed for 'Worker Initiated-Skip CalHEERS' or 'Inter-County Transfer' Negative Action Reasons
- The DER used in EDBC has an Initiated Date prior to July 29, 2019

CalSAWS will trigger a Disposition for CalWORKs or CalFresh EDBC that includes eligibility information for those programs in response to referral requests for those programs received from CalHEERS. A Disposition for CalFresh and CalWORKs do not update the status of the DER and a CalFresh Disposition is only sent once per CalFresh referral from CalHEERS. CalWORKs EDBC may trigger additional Dispositions if the eligibility changes and the Medi-Cal program is still Pending or Active in CalSAWS.

CalSAWS also sends an 'auto-Disposition' for a new DER with Determination Type of 'Referral' when the DER is linked to a CalSAWS case and the user updates the status to 'Reviewed' if all individuals in the DER are MAGI Pending. This Disposition is meant to communicate the case and person linkage to CalHEERS and is sent without the user running Medi-Cal EDBC.

CalHEERS has logic to process the Disposition transaction to keep both systems in sync, but CalHEERS does not always update their system with the Disposition eligibility information as CalSAWS expects. This can be due to CalHEERS design, CalHEERS out of order processing, newer DERs that overwrite the Disposition information, the Disposition transaction erroring out, or CalHEERS retriggering the Business Rules Engine and not sending a DER to CalSAWS with the information.

CalHEERS has logic to put individuals in 'Awaiting Review' and will only move them out of 'Awaiting Review' and authorize the final eligibility in CalHEERS when they process the Disposition from CalSAWS.

CalSAWS allows a user to update the status of a DER to 'Not Needed' or 'Covered California Only' and that DER is never used in CalSAWS EDBC nor will trigger a Disposition. If the DER has any individual in 'Awaiting Review', this can leave the systems out of sync because CalHEERS is waiting for a Disposition but CalSAWS will not send one.

CalSAWS updates the status of a Disposition to 'Complete' when CalHEERS acknowledges they received the transaction. However, eHIT does not have a way for CalHEERS to communicate to CalSAWS the result of them processing the Disposition. This Status of 'Complete' is misleading.

1.2 Requests

With CalHEERS R25.6 CR 253663, Disposition processing on the CalHEERS-end will be enhanced significantly to include safeguards against out-of-order and stale-dated processing. Additionally, CalHEERS will start to consume the final MAGI Medi-Cal eligibility status from CalSAWS on a Disposition, including denials (IE) and discontinuances (DS) that would be considered overrides of the CalHEERS Business Rules Engine. These changes will support CalHEERS staying in sync with CalSAWS, the system of record for Medi-Cal eligibility.

CalSAWS will make changes to Disposition generation logic to provide a more holistic case view in a single Disposition transaction and automate Disposition triggers to keep CalHEERS in sync. Additionally, the CalHEERS processing result of a Disposition transaction will be communicated to CalSAWS via a new eHIT transaction.

1.3 Overview of Recommendations

1. The MAGI Disposition List Detail Page will be updated to display the Disposition Dates in place of the Program column.
2. The MAGI Disposition Detail Page will be updated to display holistic Disposition information and the CalHEERS processing status of the Disposition.
3. The MAGI Disposition Acknowledgement Detail page will be created to display the high-level details of the eHIT inbound Disposition Acknowledgement transaction.
4. The MAGI Disposition Acknowledgement Person Detail page will be created to display the person-level details of the eHIT inbound Disposition Acknowledgement transaction.
5. The Inter-Agency Transfer Summary page will be updated to include a button for navigating to the new MAGI Disposition Update page.
6. The MAGI Disposition Update page will be created to give the ability to request sending a new Disposition to CalHEERS for a selected Benefit Month without running EDBC.
7. The MAGI Referral Detail Page will be updated to no longer allow a user setting the Status to 'Covered CA Only' and to prevent a user setting the Status to 'Not Needed' when there is a MAGI member in 'Awaiting Review'.
8. The MAGI Determination Summary Page will be updated to add navigation to the MAGI Disposition List Page in place of the Disposition Hyperlink Column.
9. eHIT will be updated to consume and save the new inbound Disposition Acknowledgement transaction sent from CalHEERS.
10. eHIT will be updated to generate a holistic Disposition that will include summarized program eligibility information for Medi-Cal, CalWORKs, and CalFresh in a single transaction.
11. eHIT will be updated to include an Ineligible/Discontinuance (IE/DS) Status Reason for Medi-Cal IE/DS individuals on the Disposition that are not IE/DS on the Associated MAGI Determination.
12. eHIT will be updated to consume and process CalHEERS Business Validation #203 for stale-dating logic and automate triggering a new Disposition to remediate applicable eligibility periods.

13. eHIT will be updated to allow User Requested Dispositions to communicate effective CalSAWS Case Eligibility information without the need for running EDBC.

1.4 Assumptions

1. Dispositions processed by CalHEERS prior to this change will not be updated to reflect as 'CalHEERS Processed'.
2. Disposition Acknowledgement Transaction information will be received for Dispositions that are processed by CalHEERS after the release of this change.
3. Relevant Job Aids will be updated with SCRs CA-287562 and CA-287563.
4. CalHEERS may continue to keep the County of Responsibility for a case locked when a referral for Non-MAGI, CalWORKs, or CalFresh has not been completed by a Disposition.

2 RECOMMENDATIONS

2.1 MAGI Disposition List Page

2.1.1 Overview

The MAGI Disposition List Page will be updated to display the Disposition Dates in place of the Program column.

2.1.2 Page Mockup

MAGI Disposition List

Close

Search

Determination ID:
327984

Program:

Initiated Date
From: To:

Results per Page: 25 Search

Search Results Summary Results 1 - 1 of 1

Initiated Date	Program	Status
06/05/2025 12:10 PM	Medi-Cal	Complete

Close

This Type 1 page took 0.16 seconds to load.

Figure 2.1.2.0 – Current MAGI Disposition List Page

Close

Search

Determination ID:

327984

Program:

Initiated Date

From:

To:

Results per Page: 25

Search

Search Results Summary

Results 1 - 1 of 1

Initiated Date	Dates	Status
06/05/2025 12:10 PM	07/01/2025 -	Sent

Close

This Type 1 page took 0.16 seconds to load.

Figure 2.1.2.1 – Updated MAGI Disposition List Page with Dates column replacing Program column and Disposition Status Displaying as ‘Sent’

2.1.3 Description of Changes

- Replace the ‘Program’ column with a column to capture the Disposition Benefit Month period labeled ‘Dates’ in the following format: <Begin Date> - <End Date>
 - Each Date is in the format ‘MM/DD/YYYY’ except when the End Date is High-dated, in which case display nothing.

Example 1 – Closed-dated : 07/01/2025 - 07/31/2025

Example 2 – High-dated: 07/01/2025 -

- Update the page to use the new CalHEERS Disposition Status Reference Table decode in the EICT Stat Code lookup (CT450_RT06). (See 2.9.2.1.a)

Technical Note: The ‘Program’ Drop List will continue to filter Dispositions tied to the selected Program (e.g. If ‘CalWORKs’ is selected, Dispositions that have CalWORKs eligibility information will be filtered in the ‘Search Results Summary’ section).

2.1.4 Page Location

- Global:** Case Info
- Local:** e-Tools
- Task:** MAGI Referral Search -> ‘Initiated Date’ hyperlink -> ‘Disposition’ button

2.1.5 Security Updates

No Change

2.1.6 Page Mapping

Add the new 'Dates' field to the Page Mapping and remove the 'Program' field.

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

No Change

2.2 MAGI Disposition Detail Page

2.2.1 Overview

The MAGI Disposition Detail Page will be updated to display holistic Disposition information and the CalHEERS processing status of the Disposition.

2.2.2 Page Mockup

MAGI Disposition Detail

Close

MAGI Case Number:
5000034577

MAGI Case Name:
Berry

Determination ID:
327984

Case Number:
[2677975](#)

Case Name:
Rasp Berry

Type:
Disposition

Status:
Complete

▼ Case Members

Name	CalSAWS PN	CalHEERS PN	Program	Program Status	Aid Code	Override Reason	Dates
Berry, Rasp 24M	01	01	Medi-Cal	Active	M3		06/01/2025 - 06/30/2025
Berry, Blue 23F	02	02	Medi-Cal	Denied			06/01/2025 - 06/30/2025
Berry, Pink 4M	03	03	Medi-Cal	Active	P7		06/01/2025 - 06/30/2025

View Associations

Worker Information

Worker ID:
36LS002400

Status History

Status	Status Date	Initiated By
Complete	06/05/2025 12:10 PM	249763
Ready for Transfer	06/05/2025 12:10 PM	1003641

Close

This Type 1 page took 0.60 seconds to load.

Figure 2.2.2.0 – Current MAGI Disposition Detail Page

MAGI Disposition Detail

Close

MAGI Case Number:

5000034577

MAGI Case Name:

Berry

Determination ID:

327995

Case Number:

[2677975](#)

Case Name:

Rasp Berry

Type:

Disposition

Status:

Sent

▼ Medi-Cal

Name	CalSAWS PN	CalHEERS PN	Status	Aid Code	Status Reason	Override Reason	Dates
Berry, Rasp 24M	01	01	Active	M3			07/01/2025 -
Berry, Blue 23F	02	02	Denied		Gets Duplicate Aid		07/01/2025 -
Berry, Pink 5M	03	03	Active	P7			07/01/2025 -

▼ CalWORKs

Name	CalSAWS PN	CalHEERS PN	Status	Aid Code	Override Reason	Dates
Berry, Blue 23F	02	02	Active	30		07/01/2025 -

▼ CalFresh

Name	CalSAWS PN	CalHEERS PN	Status	Aid Code	Override Reason	Dates
Berry, Rasp 24M	01	01	Active	09		07/01/2025 -
Berry, Pink 5M	03	03	Active	09		07/01/2025 -

Worker Information

Worker ID:

36LS002400

Status History

Status	Status Date	Initiated By
Sent	06/17/2025 12:15 PM	249763
Ready for Transfer	06/17/2025 12:10 PM	1003641

Close

This [Type 1](#) page took 0.19 seconds to load.

Figure 2.2.2.1 – Updated MAGI Disposition Detail Page – ‘Sent’ Status

MAGI Disposition Detail

Close

MAGI Case Number:

5000034577

MAGI Case Name:

Berry

Determination ID:

327995

Case Number:

[2677975](#)

Case Name:

Rasp Berry

Type:

Disposition

Status:

[CalHEERS Processed](#)

Medi-Cal

Name	CalSAWS PN	CalHEERS PN	Status	Aid Code	Status Reason	Override Reason	Dates
Berry, Rasp 24M	01	01	Active	M3			07/01/2025 -
Berry, Blue 23F	02	02	Denied		Gets Duplicate Aid		07/01/2025 -
Berry, Pink 5M	03	03	Active	P7			07/01/2025 -

CalWORKs

Name	CalSAWS PN	CalHEERS PN	Status	Aid Code	Override Reason	Dates
Berry, Blue 23F	02	02	Active	30		07/01/2025 -

CalFresh

Name	CalSAWS PN	CalHEERS PN	Status	Aid Code	Override Reason	Dates
Berry, Rasp 24M	01	01	Active	09		07/01/2025 -
Berry, Pink 5M	03	03	Active	09		07/01/2025 -

Worker Information

Worker ID:

36LS002400

Status History

Status	Status Date	Initiated By
CalHEERS Processed	06/17/2025 12:21 PM	249763
Sent	06/17/2025 12:15 PM	249763
Ready for Transfer	06/17/2025 12:10 PM	1003641

Close

This [Type 1](#) page took 0.19 seconds to load.

Figure 2.2.2.2 – Updated MAGI Disposition Detail Page – ‘CalHEERS Processed’ Status

2.2.3 Description of Changes

1. Relabel the 'Case Members' section to display as 'Medi-Cal'.
 - a. Remove the 'View Associations' button.
 - b. Remove the 'Program' column.
 - c. Relabel the 'Program Status' column to display as 'Status'
 - d. Add the 'Status Reason' column between 'Aid Code' and 'Override Reason'.
 - i. Column header shall be multi-line with newline after 'Status' per the Mockup.
 - ii. Page Mapping description will read: 'Reason for Ineligible/Discontinuance when person is not MAGI Ineligible or Discontinue Status on the Associated MAGI Determination.'
 - e. Update the 'Override Reason' column to be multi-line with newline after 'Override' per the Mockup.
2. Add new collapsible sections for the CalWORKs and CalFresh programs similar to the 'Medi-Cal' section as shown in mockups.
 - a. If no persons are included for a particular program, auto-collapse the section for that program on page load.
 - i. When uncollapsed, the table will display 'No Data Found' in a single row.
 - b. The 'Status Reason' column is not applicable to the CalWORKs and CalFresh programs in eHIT and will not be displayed in these sections.
3. Update the page to use the new CalHEERS Disposition Status Reference Table decode in the EICT Stat Code lookup (CT450_RT06). (See 2.9.2.1.a)
4. Update the 'Status' field of a Disposition to display as a hyperlink to the 'MAGI Disposition Acknowledgement Detail' Page when the status of a Disposition is 'CalHEERS Processed'. (See 2.9.2.1.b)

2.2.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search -> 'Initiated Date' hyperlink -> 'Disposition' button -> 'Initiated Date' hyperlink

2.2.5 Security Updates

No Change

2.2.6 Page Mapping

Update the Page Mapping to split 'Case Members Information' field entry into three fields labeled to read as 'Medi-Cal Members', 'CalWORKs Members', 'CalFresh Members' and add an entry for 'Status Reason' and remove the entry for the 'Program' field.

2.2.7 Accessibility

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

2.2.8 Page Usage/Data Volume Impacts

No Change

2.3 MAGI Disposition Acknowledgement Detail Page

2.3.1 Overview

The MAGI Disposition Acknowledgement Detail page will be created to display the high-level details of the eHIT inbound Disposition Acknowledgement transaction.

2.3.2 Page Mockup

MAGI Disposition Acknowledgement Detail

Close

MAGI Case Number: 5000034577	Disposition ID: 10019999021	Initiated Date: 06/17/2025 12:21 PM
Case Number: 2677975	Determination ID: 327995	
BRE Triggered: Yes	Open Program Referrals: None	

MAGI Case Members

Name	CalSAWS PN	CalHEERS PN	MAGI Status	Other MC Status	Aid Code	MAGI Dates
Berry, Rasp 24M	01	01	Eligible		M3	07/01/2025 -
Berry, Blue 23F	02	02	Ineligible	Eligible	30	07/01/2025 -
Berry, Pink 5M	03	03	Eligible		P7	07/01/2025 -

Close

This Type 1 page took 0.23 seconds to load.

Figure 2.3.2.1 – New MAGI Disposition Acknowledgement Detail Page

2.3.3 Description of Changes

1. Create a new page named 'MAGI Disposition Acknowledgement Detail' per the above mockup with below fields that are populated as returned in the Disposition Acknowledgement transaction from CalHEERS.
 - a. Add an unnamed section with the following fields:

FIELD NAME	DESCRIPTION
MAGI Case Number	The MAGI Case Number.
Disposition ID	The Message ID of the Disposition.
Initiated Date	The Message Timestamp of the Disposition Acknowledgment transaction.
Case Number	The SAWS Case Number. The hyperlink navigates to 'Case Summary' Page for the case.
Determination ID	The DER ID of the DER-U, if any, triggered by the associated Disposition transaction.
BRE Triggered	Yes/No indicator for whether the BRE ran or not due to the Disposition that was processed.
Open Program Referrals	<p>Aggregate list of open CalWORKs, CalFresh, Non-MAGI referrals reported on the Disposition Acknowledgement transaction.</p> <p>Display as 'None' if there are none or all the referrals status codes in the transaction are Closed ('CL').</p> <p>Example 1 – None: 'None'</p> <p>Example 2 – All Open Listed: 'CalWORKs, CalFresh, Non-MAGI'</p> <p>Example 3 – Partial Open Listed: 'CalFresh, Non-MAGI'</p>

- b. Add a section named 'MAGI Case Members' with a table having the followings fields:

FIELD NAME	DESCRIPTION
Name	Name of Case Member in 'Last Name, First Name AgeGender' Format. The hyperlink navigates to the 'MAGI Disposition Acknowledgement Person Detail' Page.
CalSAWS PN	CalSAWS Person Number.
CalHEERS PN	CalHEERS Person Number.
MAGI Status	MAGI Status for the Person.
Other MC Status	Non-MAGI and other Cash-based Medi-Cal Program Eligibility Status for the Person.
Aid Code	Aid Code for the Person.
MAGI Dates	MAGI Medi-Cal Eligibility Date Range. Example 1 – Closed-dated : 07/01/2025 – 07/31/2025 Example 2 – High-dated: 07/01/2025 -

2.3.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search -> 'Initiated Date' hyperlink -> 'Disposition' button
-> 'Initiated Date' hyperlink -> 'CalHEERS Processed' hyperlink

2.3.5 Security Updates

1. Security Rights

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
MAGIDispositionAck nowledgementDetail View	View MAGI Disposition Acknowledgem ent Detail Information	MAGI View; MAGI Edit

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
MAGI View	View MAGI Information	No change to current mapping
MAGI Edit	View and edit MAGI Information	No change to current mapping

2.3.6 Page Mapping

Add page mapping for new page and fields.

2.3.7 Accessibility

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

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 MAGI Disposition Acknowledgement Person Detail Page

2.4.1 Overview

The MAGI Disposition Acknowledgement Person Detail page will be created to display the person-level details of the eHIT inbound Disposition Acknowledgement transaction.

2.4.2 Page Mockup

MAGI Disposition Acknowledgement Person Detail

Close

Name: Berry, Blue	CalSAWS PN: 02	CalHEERS PN: 02
-----------------------------	--------------------------	---------------------------

Eligibility

Aid Code: 30	Eligibility Evaluation Reasons:	Consumer Protection Program:
------------------------	--	-------------------------------------

Medi-Cal

MAGI Status: Ineligible	MAGI Begin Date: 07/01/2025	MAGI End Date:
Soft Pause Reason: Not Applicable		
Other MC Status: Eligible	Other MC Begin Date: 07/01/2025	Other MC End Date:

Covered California

APTC Status: Ineligible	APTC Begin Date: 07/01/2025	APTC End Date: 12/31/2025
CSR Status: Ineligible	CSR Begin Date: 07/01/2025	CSR End Date: 12/31/2025
QHP Status: Ineligible	QHP Begin Date: 07/01/2025	QHP End Date: 12/31/2025
Title XXI (MCAP/CCHIP) Status: Ineligible	Title XXI Begin Date: 07/01/2025	Title XXI End Date: 12/31/2025

IAP Transition

Carry Forward Begin Date:	IAP Transition Begin Date:	IAP Transition End Date:
----------------------------------	-----------------------------------	---------------------------------

Close

This Type 1 page took 0.18 seconds to load.

Figure 2.4.2.1 – New MAGI Disposition Acknowledgement Person Detail Page

2.4.3 Description of Changes

1. Create a new page named 'MAGI Disposition Acknowledgement Person Detail' per the above mockup with below fields that are populated as returned in the Disposition Acknowledgement transaction from CalHEERS.
 - a. Add an unnamed section with the following fields:

FIELD NAME	DESCRIPTION
Name	Name of Person in Last Name, First Name format.
CalSAWS PN	CalSAWS Person Number.
CalHEERS PN	CalHEERS Person Number.

- b. Add a section named 'Eligibility' with the following fields:

FIELD NAME	DESCRIPTION
Aid Code	Aid Code of the Person.
Eligibility Evaluation Reasons	Eligibility Evaluation Reasons sent by CalHEERS for the person such as relating to Soft Pause, Carry Forward, and MAGI Medi-Cal Awaiting Review.
Consumer Protection Program	Consumer Protection Program indicated by CalHEERS for the person such as Deemed Infant.

- c. Add a section named 'Medi-Cal' with the following fields:

FIELD NAME	DESCRIPTION
MAGI Status	MAGI Status for the Person.
MAGI Begin Date	Begin Date of the MAGI Status for the Person.
MAGI End Date	End Date of the MAGI Status for the Person.
Soft Pause Reason	The Reason the Person is Soft Pause, if applicable.
Other MC Status	Non-MAGI and other Cash-based Medi-Cal Program Eligibility Status for the Person.
Other MC Begin Date	Begin Date of the Other MC Status for the Person.
Other MC End Date	End Date of the Other MC Status for the Person.

d. Add a section named 'Covered California' with the following fields:

FIELD NAME	DESCRIPTION
APTC Status	APTC Status for the Person.
APTC Begin Date	Begin Date of the APTC Status for the Person.
APTC End Date	End Date of the APTC Status for the Person.
CSR Status	CSR Status for the Person.
CSR Begin Date	Begin Date of the CSR Status for the Person.
CSR End Date	End Date of the CSR Status for the Person.
QHP Status	QHP Status for the Person.
QHP Begin Date	Begin Date of the QHP Status for the Person.
QHP End Date	End Date of the QHP Status for the Person.
Title XXI (MCAP/CCHIP) Status	Title XXI (MCAP/CCHIP) Status for the Person.
Title XXI Begin Date	Begin Date of the Title XXI (MCAP/CCHIP) Status for the Person.
Title XXI End Date	End Date of the Title XXI (MCAP/CCHIP) Status for the Person.

e. Add a section named 'IAP Transition' with the following fields:

FIELD NAME	DESCRIPTION
Carry Forward Begin Date	The Carry Forward Begin Date for the Person.
IAP Transition Begin Date	The Begin Date of the IAP Transition for the Person.
IAP Transition End Date	The End Date of the IAP Transition for the Person.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search -> 'Initiated Date' hyperlink -> 'Disposition' button -> 'Initiated Date' hyperlink -> 'CalHEERS Processed' hyperlink -> 'Person' hyperlink

2.4.5 Security Updates

1. Security Rights

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
MAGIDispositionAck nowledgementPerso nDetailView	View MAGI Disposition Acknowledgem ent Person Detail Information	MAGI View; MAGI Edit

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
MAGI View	View MAGI Information	No change to current mapping
MAGI Edit	View and edit MAGI Information	No change to current mapping

2.4.6 Page Mapping

Add page mapping for new page and fields.

2.4.7 Accessibility

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

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Inter-Agency Transfer Summary Page

2.5.1 Overview

The Inter-Agency Transfer Summary page will be updated to include a button for navigating to the new MAGI Disposition Update page.

2.5.2 Page Mockup

Inter-Agency Transfer Summary

Search

Agency:
CalHEERS

Type:
All

Status:

Initiated Date
From:

To:

Results per Page: 25 Search

Search Results Summary						Results 1 - 7 of 7
Initiated Date	Benefit Month	Sending Case Number	Agency	Type	Status	
06/13/2025 4:33PM	07/2025	5000035129	CalHEERS	Determination Change	Reviewed	
06/10/2025 1:50 PM	07/2025	5000035129	CalHEERS	Determination Response	Complete	
06/10/2025 1:46 PM	07/2025	5000035129	CalHEERS	Determination Response	Complete	
05/15/2025 3:22 PM	06/2025	5000035129	CalHEERS	Determination Response	Complete	
05/15/2025 3:21 PM	05/2025	5000035129	CalHEERS	Determination Response	Reviewed	
03/06/2025 1:45 PM	04/2025	5000035129	CalHEERS	Determination Response	Complete	
03/06/2025 1:45 PM	03/2025	5000035129	CalHEERS	Determination Response	Complete	

MAGI Disposition Update

This Type 1 page took 0.55 seconds to load.

Figure 2.5.2.1 – Inter-Agency Transfer Summary Page with New MAGI Disposition Update Button

• Unable to navigate to the MAGI Disposition Update page because the Status of one or more MAGI Determinations is 'In Process'.

Inter-Agency Transfer Summary

Agency:
CalHEERS

Type:
All

Status:

Initiated Date
From:

To:

Results per Page: 25 Search

Search Results Summary						Results 1 - 7 of 7
Initiated Date	Benefit Month	Sending Case Number	Agency	Type	Status	
06/13/2025 4:33PM	07/2025	5000035129	CalHEERS	Determination Change	In Process	
06/10/2025 1:50 PM	07/2025	5000035129	CalHEERS	Determination Response	Complete	
06/10/2025 1:46 PM	07/2025	5000035129	CalHEERS	Determination Response	Complete	
05/15/2025 3:22 PM	06/2025	5000035129	CalHEERS	Determination Response	Complete	
05/15/2025 3:21 PM	05/2025	5000035129	CalHEERS	Determination Response	Reviewed	
03/06/2025 1:45 PM	04/2025	5000035129	CalHEERS	Determination Response	Complete	
03/06/2025 1:45 PM	03/2025	5000035129	CalHEERS	Determination Response	Complete	

MAGI Disposition Update

This Type 1 page took 0.55 seconds to load.

Figure 2.5.2.2 – Inter-Agency Transfer Summary Page with New MAGI Disposition Update Button Validation Message

2.5.3 Description of Changes

1. Add a new button labeled 'MAGI Disposition Update' to display under the 'Search Results Summary' section which will navigate to the 'MAGI Disposition Update' page when clicked.
 - a. Do not display the button if there are no MAGI Determinations for the Case.
 - b. Do not display the button if the logged in user does not have the required security right detailed in 2.5.5 to access the MAGI Disposition Update Page.
2. Add a page validation to prevent the user from navigating to the 'MAGI Disposition Update' page when there is at least one MAGI Determination in 'In Process' Status per the Figure 2.5.2.2 mockup:
 - a. **Validation Message:** 'Unable to navigate to the MAGI Disposition Update page because the Status of one or more MAGI Determinations is 'In Process'.'

2.5.4 Page Location

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

2.5.5 Security Updates

1. Security Rights

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
MAGIDispositionUpdate	Navigate to and use the CalHEERS Disposition Update Page	MAGI Disposition Update

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
MAGI Disposition Update	Send Disposition Manually to CalHEERS	Eligibility Supervisor; Eligibility Supervisor - LAC; System Administrator

2.5.6 Page Mapping

No Change

2.5.7 Accessibility

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

2.5.8 Page Usage/Data Volume Impacts

No Change

2.6 MAGI Disposition Update Page

2.6.1 Overview

The MAGI Disposition Update page will be created to give the ability to request sending a new Disposition to CalHEERS for a selected Benefit Month without running EDBC.

2.6.2 Page Mockup

The mockup shows a web page titled "MAGI Disposition Update". At the top left, there is a red asterisk icon followed by the text "Indicates required fields". At the top right is a "Close" button. Below the title bar is a blue header section labeled "Request Manual Disposition". Under this header, the text "Benefit Month: *" is followed by a dropdown menu. To the right of the dropdown is a "Request Disposition" button. At the bottom right is another "Close" button. A dark blue footer bar at the bottom contains the text "This Type 1 page took 0.13 seconds to load."

Figure 2.6.2.1 – New CalHEERS Disposition Update Page

This mockup is similar to the previous one, but the "Benefit Month" dropdown menu is open, displaying a list of months from 01/2026 down to 12/2024. The "Request Disposition" button is still visible to the right of the dropdown. The "Close" button at the bottom right is also present. The dark blue footer bar at the bottom contains the text "page took 0.13 seconds to load."

Figure 2.6.2.2 – New CalHEERS Disposition Update Page – Example Selection with Ongoing Medi-Cal Case from 2023 when System Date is 11/25/2025

MAGI Disposition Update

* - Indicates required fields

Request Manual Disposition

Benefit Month: *

12/2025
11/2025
10/2025
09/2025
08/2025
07/2025
06/2025

Request Disposition

Close

page took 0.13 seconds to load.

Figure 2.6.2.3 – New CalHEERS Disposition Update Page – Example Selection with Ongoing June 2025 Intake Medi-Cal Case when System Date is 11/06/2025

MAGI Disposition Update

* - Indicates required fields

Close

• **Disposition Not Requested: The Associated MAGI Determination for the selected Benefit Month is in a status which can be used in EDBC to send a Disposition.**

Request Manual Disposition

Benefit Month: *

08/01/2025

Request Disposition

Close

This Type 1 page took 0.13 seconds to load.

Figure 2.6.2.4 – New CalHEERS Disposition Update Page – Hard Validation for MAGI Determination which can be worked via EDBC

MAGI Disposition Update

* - Indicates required fields

Close

- Disposition Not Requested: The Status of one or more MAGI Determinations for the Case is 'In Process'.

Request Manual Disposition

Benefit Month: *

08/2025

Request Disposition

Close

This Type_1 page took 0.13 seconds to load.

Figure 2.6.2.5 – New CalHEERS Disposition Update Page – Hard Validation for MAGI Determination Status 'In Process'

MAGI Disposition Update

* - Indicates required fields

Close

- Disposition Not Requested: There is no MAGI Determination available to be associated with the selected Benefit Month.

Request Manual Disposition

Benefit Month: *

03/2025

Request Disposition

Close

This Type_1 page took 0.13 seconds to load.

Figure 2.6.2.6 – New CalHEERS Disposition Update Page – Hard Validation for No MAGI Determination Available

MAGI Disposition Update

*- Indicates required fields
Close

- Disposition Not Requested: A Disposition cannot be sent to CalHEERS for cases that have ever had 'Minor Consent' Requested Medi-Cal Type.

Request Manual Disposition

Benefit Month: *

08/01/2025

Request Disposition
Close

This Type 1 page took 0.13 seconds to load.

Figure 2.6.2.7 – New CalHEERS Disposition Update Page – Hard Validation for 'Minor Consent' Requested Medi-Cal Type

MAGI Disposition Update

*- Indicates required fields
Close

- Disposition Not Requested: The Associated DER's Initiated Date is prior to July 29, 2019.

Request Manual Disposition

Benefit Month: *

08/01/2025

Request Disposition
Close

This Type 1 page took 0.13 seconds to load.

Figure 2.6.2.8 – New CalHEERS Disposition Update Page – Hard Validation for Associated DER with Initiated Date prior to July 29, 2019

MAGI Disposition Update

* - Indicates required fields
Close

A Disposition has been requested for **12/01/2025** to **12/31/2025** and should be sent within 10-15 minutes.

Request Manual Disposition

Benefit Month: *

Request Disposition

Close

This Type 1 page took 0.13 seconds to load.

Figure 2.6.2.9 – New CalHEERS Disposition Update Page – Example for Closed-Dated Disposition Requested on System Date 12/06/2025

MAGI Disposition Update

* - Indicates required fields
Close

A Disposition has been requested for **01/01/2026** to **High-Date** and should be sent within 10-15 minutes.

Request Manual Disposition

Benefit Month: *

Request Disposition

Close

This Type 1 page took 0.13 seconds to load.

Figure 2.6.2.10 – New CalHEERS Disposition Update Page – Example for High-Dated Disposition Requested on System Date 12/06/2025

2.6.3 Description of Changes

1. Create a new page named 'MAGI Disposition Update' per the above mockup.
 - a. Add a section named 'Request Manual Disposition' with the following fields:

FIELD NAME	DESCRIPTION
Benefit Month	<p>A required field. A Drop List with Benefit Months populated based on the System Date in descending order as follows*:</p> <ul style="list-style-type: none">• The beginning of the range will be the latest of either 11 months prior to the System Date calendar month or the earliest Medi-Cal program Beginning Date of Aid calendar month.• The end of the range will be the Come-Up Month. <p>Example 1 – Ongoing 2023 Medi-Cal Case on System Date 11/25/2025 (Figure 2.6.2.2): Display the Benefit Month Range from 12/2024 - 01/2026 in Descending Order</p> <p>Example 2 – Ongoing June 2025 Intake Medi-Cal Case on System Date 11/06/2025 (Figure 2.6.2.3):: Display the Benefit Month Range from 06/2025 - 12/2025 in Descending Order</p> <p>*Default selection for this Drop List to be blank on page load.</p>

- b. Add a button labeled 'Request Disposition' which will request a Disposition transaction to be sent to CalHEERS with the case eligibility per the Requested Benefit Month when clicked. (See 2.9.2.5 – User Requested Disposition)
 - i. The **Begin Date** of the Disposition will be the first day of the Benefit Month selected.
 1. For use in variable messaging, format as 'MM/DD/YYYY'.
 - ii. The **End Date** of the Disposition will be High-Dated for the Come-Up month only and Closed-Dated (last day of the Benefit Month) for all other Benefit Months.
 1. For use in variable messaging, format as 'High-Date' when High-Dated and 'MM/DD/YYYY' when Closed-Dated.
 - iii. Upon successful click of the button (no hard validation was triggered), display below variable message to the user and clear out the Benefit Month selection from the Drop List:
 1. 'A Disposition has been requested for **<Begin Date>** to **<End Date>** and should be sent within 10-15 minutes.'

2. Add a page validation preventing a Disposition request from being performed when the Associated MAGI Determination for the Requested Benefit Month is in 'Reviewed' or 'Completed Manually' Status:
 - a. **Validation Message:** 'Disposition Not Requested: The Associated MAGI Determination for the selected Benefit Month is in a status which can be used in EDBC to send a Disposition.'
 - b. Suppress this page validation if the Medi-Cal program is Closed and all persons in the Associated MAGI Determination are MAGI 'Ineligible' or 'Discontinue' status.
3. Add a page validation preventing a Disposition request from being performed when the Status of at least one MAGI Determination for the Case is 'In Process':
 - a. **Validation Message:** 'Disposition Not Requested: The Status of one or more MAGI Determinations for the Case is 'In Process'.'
4. Add a page validation preventing a Disposition request from being performed when an Associated MAGI Determination for the selected Benefit Month cannot be identified:
 - a. **Validation Message:** 'Disposition Not Requested: There is no MAGI Determination available to be associated with the selected Benefit Month.'
5. Add a page validation preventing a Disposition request from being performed when anyone has ever had a 'Minor Consent' Requested Medi-Cal Type recorded on the case: (see EHIT section 2.9.2.f.i)
 - a. **Validation Message:** 'Disposition Not Requested: A Disposition cannot be sent to CalHEERS for cases that have ever had 'Minor Consent' Requested Medi-Cal Type.'
6. Add a page validation preventing a Disposition request from being performed when the Associated MAGI Determination for the selected Benefit Month has an 'Initiated Date' prior to July 29th, 2019: (see EHIT section 2.9.2.f.v)
 - a. **Validation Message:** 'Disposition Not Requested: The Associated DER's Initiated Date is prior to July 29, 2019.'

2.6.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** IAT Summary -> 'MAGI Disposition Update' button

2.6.5 Security Updates

See 2.5.5 for security detail governing access to this page.

2.6.6 Page Mapping

Add page mapping for new page and fields.

2.6.7 Accessibility

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

2.6.8 Page Usage/Data Volume Impacts

N/A

2.7 MAGI Referral Detail Page

2.7.1 Overview

The MAGI Referral Detail Page will be updated to no longer allow a user setting the Status to 'Covered CA Only' and to prevent a user setting the Status to 'Not Needed' when there is a MAGI member in 'Awaiting Review'.

2.7.2 Page Mockup

MAGI Referral Detail

By selecting this status option, you are confirming a Disposition to CalHEERS is not required for this MAGI Determination and it should not be used in EDBC.

Save and ReturnCancel

MAGI Case Number: 5000034957	MAGI Case Name: McClean	Initiated Date: 08/10/2025 12:29 PM
Origination: Agent	Determination ID: 330599	Determination Category: Unsolicited
Case Number: 2678061	Case Name: Thadeus McClean	Request ID:
Determination Type: Determination Change	Status: * <div>Not Needed</div>	Covered CA Change:
Run Reason: Continuing	Benefit Month: 08/01/2025	Program: * <div>Medi-Cal</div>

Application

Case Members

Name	DOB	SSN	CIN	CalSAWS PN	CalHEERS PN	Non-Compliance	CalSAWS Person
McClean, Thadeus 63M	05/20/1962	286-63-9002	849735356		01		No

MAGI

RE Month:
Begin Month:
02/01/2025

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
McClean, Thadeus 63M	Discontinue	No		Medicare Ineligible, Current Monthly Income Used, Income Limit - Not Within Range, MAGI Medi-Cal: Awaiting Review

Figure 2.7.2.1 – Updated MAGI Referral Detail Page in Edit Mode with New Message when Selecting 'Not Needed' Status

- **Status** - This MAGI Determination cannot be marked as Not Needed because one or more persons is in MAGI Awaiting Review status. Please contact a supervisor with override rights to save.

MAGI Referral Detail

By selecting this status option, you are confirming a Disposition to CalHEERS is not required for this MAGI Determination and it should not be used in EDBC.

Save and Return

Cancel

MAGI Case Number:
5000034957

MAGI Case Name:
McClean

Initiated Date:
08/10/2025 12:29 PM

Origination:
Agent

Determination ID:
330599

Determination Category:
Unsolicited

Case Number:
[2678061](#)

Case Name:
Thadeus McClean

Request ID:

Determination Type:
Determination Change

Status: *
Not Needed

Covered CA Change:

Run Reason:
Continuing

Benefit Month:
08/01/2025

Program: *
Medi-Cal

Application

Case Members

Name	DOB	SSN	CIN	CalSAWS PN	CalHEERS PN	Non-Compliance	CalSAWS Person
McClean, Thadeus 63M	05/20/1962	286-63-9002	849735356		01		No

MAGI

RE Month:

Begin Month:
02/01/2025

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
McClean, Thadeus 63M	Discontinue	No		Medicare Ineligible, Current Monthly Income Used, Income Limit - Not Within Range, MAGI Medi-Cal: Awaiting Review

Figure 2.7.2.2 – Updated MAGI Referral Detail Page in Edit Mode with New Validation Message when Selecting ‘Not Needed’ Status with MAGI Members in Awaiting Review and Clicking Save and Return

- **Status** - This MAGI Determination cannot be marked as Not Needed because one or more persons is in MAGI Awaiting Review status. Please contact a supervisor with override rights to save.

MAGI Referral Detail

By selecting this status option, you are confirming a Disposition to CalHEERS is not required for this MAGI Determination and it should not be used in EDBC.

Override

Save and Return

Cancel

MAGI Case Number:

5000034957

MAGI Case Name:

McClean

Initiated Date:

08/10/2025 12:29 PM

Origination:

Agent

Determination ID:

330599

Determination Category:

Unsolicited

Case Number:

[2678061](#)

Case Name:

Thadeus McClean

Request ID:

Determination Type:

Determination Change

Status: *

Not Needed ▼

Covered CA Change:

Run Reason:

Continuing

Benefit Month:

08/01/2025

Program: *

Medi-Cal ▼

Application

Case Members

Name	DOB	SSN	CIN	CalSAWS PN	CalHEERS PN	Non-Compliance	CalSAWS Person
McClean, Thadeus 63M	05/20/1962	286-63-9002	849735356		01		No

MAGI

RE Month:

Begin Month:

02/01/2025

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
McClean, Thadeus 63M	Discontinue	No		Medicare Ineligible, Current Monthly Income Used, Income Limit - Not Within Range, MAGI Medi-Cal: Awaiting Review

Figure 2.7.2.3 – Updated MAGI Referral Detail Page in Edit Mode with New Validation Message when Selecting ‘Not Needed’ Status with MAGI Members in Awaiting Review with Override Button Displayed for Users with the Appropriate Rights

MAGI Referral Detail

Edit

Cancel

MAGI Case Number:

5000034957

MAGI Case Name:

McClean

Initiated Date:

08/10/2025 12:29 PM

Origination:

Agent

Determination ID:

330599

Determination Category:

Unsolicited

Case Number:

[2678061](#)

Case Name:

Thadeus McClean

Request ID:

Determination Type:

Determination Change

Status: *

Not Needed

Covered CA Change:

Run Reason:

Continuing

Benefit Month:

08/01/2025

Program: *

Medi-Cal

Application

Case Members

Name	DOB	SSN	CIN	CalSAWS PN	CalHEERS PN	Non-Compliance	CalSAWS Person
McClean, Thadeus 63M	05/20/1962	286-63-9002	849735356		01		No

MAGI

RE Month:

Begin Month:

02/01/2025

Name	Status	Soft Pause Lift	Negative Action Reason	Eligibility Evaluation Reasons
McClean, Thadeus 63M	Discontinue	No		Medicare Ineligible, Current Monthly Income Used, Income Limit - Not Within Range, MAGI Medi-Cal: Awaiting Review

Figure 2.7.2.4 – Updated MAGI Referral Detail Page in View Mode after Updating the Status to ‘Not Needed’ via the Override Button

2.7.3 Description of Changes

1. Remove ‘Covered CA Only’ as a selectable option in the ‘Status’ Drop List on the ‘MAGI Referral Detail’ Page.

Technical Note: Unsolicited MAGI Determinations will continue to have their Status automatically set to ‘Covered CA Only’ when CalHEERS explicitly sends the ‘Covered CA Change’ flag (ExchangeInfoUpdateInd) as ‘Yes’ in eHIT and other criteria outlined in SCR CA-207515 is met.

2. Add a message to the page per the above mockups to display when the user selects 'Not Needed' from the 'Status' Drop List:
 - a. **Message:** 'By selecting this status option, you are confirming a Disposition to CalHEERS is not required for this MAGI Determination and it should not be used in EDBC.'
 - b. Hide the message when the user selects another status from the 'Status' Drop List.
3. Add a page validation per the above mockup to prevent the user from setting the 'Status' to 'Not Needed' when there is a MAGI Member with the 'MAGI Medi-Cal: Awaiting Review' Eligibility Evaluation Reason:
 - a. **Validation Message:** 'This MAGI Determination cannot be marked as Not Needed because one or more persons is in MAGI Awaiting Review status. Please contact a supervisor with override rights to save. '
4. Add a new button labeled 'Override' to display to the left of 'Save and Return' when the user has the appropriate security rights detailed in 2.7.5 and the above hard validation has been triggered.
 - a. Clicking the button will update the status of the MAGI Determination to 'Not Needed' and navigate the user back to View Mode of the page.
 - b. Hide the button when the user selects another status from the 'Status' Drop List.

Note: Setting the Status to 'Not Needed' will keep any individuals in Medi-Cal Awaiting Review in CalHEERS. Users must take any necessary steps to ensure CalHEERS eligibility remains in sync with CalSAWS.

2.7.4 Page Location

- **Global:** Case Info
- **Local:** e-Tools
- **Task:** MAGI Referral Search -> 'Initiated Date' hyperlink

2.7.5 Security Updates

1. Security Rights

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
MAGIReferralStatusNotNeededOverride	Bypass hard validations on the MAGI Referral Detail Page for setting Status to Not Needed	MAGI Referral Not Needed Override

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
MAGI Referral Not Needed Override	Bypass hard validations on the MAGI Referral Detail Page for setting the Status to Not Needed	Eligibility Supervisor; Eligibility Supervisor - LAC; System Administrator

2.7.6 Page Mapping

No Change

2.7.7 Accessibility

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

2.7.8 Page Usage/Data Volume Impacts

No Change

2.8 MAGI Determination Summary Page

2.8.1 Overview

The MAGI Determination Summary Page will be updated to add navigation to the MAGI Disposition List Page in place of the Disposition Hyperlink Column.

2.8.2 Page Mockup

MAGI Determination Summary

Close

Request ID:
[10020018711](#)

Benefit Month:
12/2024

Date Run:
07/06/2025

Household Eligibility:
Eligible

Run Reason:
Intake

Requested by Batch:
No

Name	Primary Aid Code	Status	Eligibility Evaluation Reasons	Negative Action Reason	Carry Forward Status
Oneill, Susie	M1	Eligible	Medicare Ineligible, Current Monthly Income Used, Income Limit - Within Range, MAGI Medi-Cal: Awaiting Review		No

EDBC Run Against this MAGI Determination

Search Results Summary

Results 1 - 1 of 1

Begin Month	End Month	Type	EDBC Program Status	Date Run	EDBC Source	Disposition
12/2024		Regular	Active	07/06/2025	Online EDBC Rules	Complete

Close

This [Type 1](#) page took 0.19 seconds to load.

Figure 2.8.2.0 – Current MAGI Determination Summary Page With Disposition Column

MAGI Determination Summary

[Dispositions](#)[Close](#)**Request ID:**[10020018711](#)**Benefit Month:**

12/2024

Date Run:

07/06/2025

Household Eligibility:

Eligible

Run Reason:

Intake

Requested by Batch:

No

Name	Primary Aid Code	Status	Eligibility Evaluation Reasons	Negative Action Reason	Carry Forward Status
Oneill, Susie	M1	Eligible	Medicare Ineligible, Current Monthly Income Used, Income Limit - Within Range, MAGI Medi-Cal: Awaiting Review		No

EDBCs Run Against this MAGI Determination

Search Results Summary

Results 1 - 1 of 1

Begin Month	End Month	Type	EDBC Program Status	Date Run	EDBC Source
12/2024		Regular	Active	07/06/2025	Online EDBC Rules

[Dispositions](#)[Close](#)This [Type 1](#) page took 0.17 seconds to load.

Figure 2.8.2.1 – Updated MAGI Determination Summary Page With Disposition Column Removed and Dispositions Button Added to Navigate to the MAGI Disposition List Page

Close

Search

Determination ID:

346010

Program:

Initiated Date

From:

To:

Results per Page: 25 Search

Search Results Summary

Results 1 - 9 of 9

Initiated Date	Dates	Status
07/06/2025 10:07 PM	08/01/2025 -	CalHEERS Processed
07/06/2025 10:07 PM	07/01/2025 - 07/31/2025	CalHEERS Processed
07/06/2025 10:07 PM	06/01/2025 - 06/30/2025	CalHEERS Processed
07/06/2025 10:07 PM	05/01/2025 - 05/31/2025	CalHEERS Processed
07/06/2025 10:07 PM	04/01/2025 - 04/30/2025	CalHEERS Processed
07/06/2025 10:07 PM	03/01/2025 - 03/31/2025	CalHEERS Processed
07/06/2025 10:07 PM	02/01/2025 - 02/28/2025	CalHEERS Processed
07/06/2025 10:07 PM	01/01/2025 - 01/31/2025	CalHEERS Processed
07/06/2025 10:07 PM	12/01/2024 - 12/31/2024	CalHEERS Processed

Close

This Type 1 page took 0.16 seconds to load.

Figure 2.8.2.2 – Clicking the Dispositions Button navigates the worker to the MAGI Disposition List Page

2.8.3 Description of Changes

1. Remove the 'Disposition' column from the 'Search Results Summary' table.
2. Add a button labeled 'Dispositions' to the left of the 'Close' buttons which when clicked, will navigate to the 'MAGI Disposition List' page for the MAGI Determination.
 - a. The button will only display when there exists Dispositions for the MAGI Determination similar to the logic for the 'Dispositions' button on the 'MAGI Referral Detail' Page.

Technical Note: The 'Search Results Summary' table should only have up to one row per individual EDBC Run against the MAGI Determination.

2.8.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> 'Determination' hyperlink'

2.8.5 Security Updates

No Change

2.8.6 Page Mapping

No Change

2.8.7 Accessibility

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

2.8.8 Page Usage/Data Volume Impacts

No Change

2.9 eHIT

2.9.1 Overview

eHIT will be updated to:

- a. Consume and save the inbound Disposition Acknowledgement transaction received from CalHEERS.
- b. Generate a holistic Disposition that will include summarized program eligibility information for Medi-Cal, CalWORKs, and CalFresh in a single transaction.
- c. Include an Ineligible/Discontinuance (IE/DS) Status Reason on the Disposition for Medi-Cal IE/DS individuals that are not IE/DS on the Associated MAGI Determination.
- d. Consume and process CalHEERS Business Validation (BV) #203 for CalHEERS stale-dating logic and automate triggering a new Disposition to remediate applicable eligibility periods.
- e. Allow User Requested Dispositions to communicate current CalSAWS Case Eligibility information without the need for running EDBC.

2.9.2 Description of Change

1. Consume and save the new inbound Disposition Acknowledgement transaction received from CalHEERS introduced in the eHIT schema with CalHEERS Change Request 252593 / CalSAWS SCR CA-279552.
 - a. Add a new decode reference table to the EICT Stat Code lookup for CalHEERS Disposition Statuses (CT450_RT06).
 - i. Copy all 'CalHEERS' statuses (CT450_RT03) to the new reference table except for 'Complete'. The new decode for 'Complete' (CT450_CM) will now display as 'Sent'.
 - b. Add a new CalHEERS Disposition Status of 'CalHEERS Processed' (CT450_CP) to be used when a Disposition Acknowledgement transaction is received against the Disposition.

- c. If CalHEERS sends multiple eligibility records for a person, such as Exchange eligibility across multiple coverage years, iterate through each node per below flow chart to best persist the relevant program eligibility information:

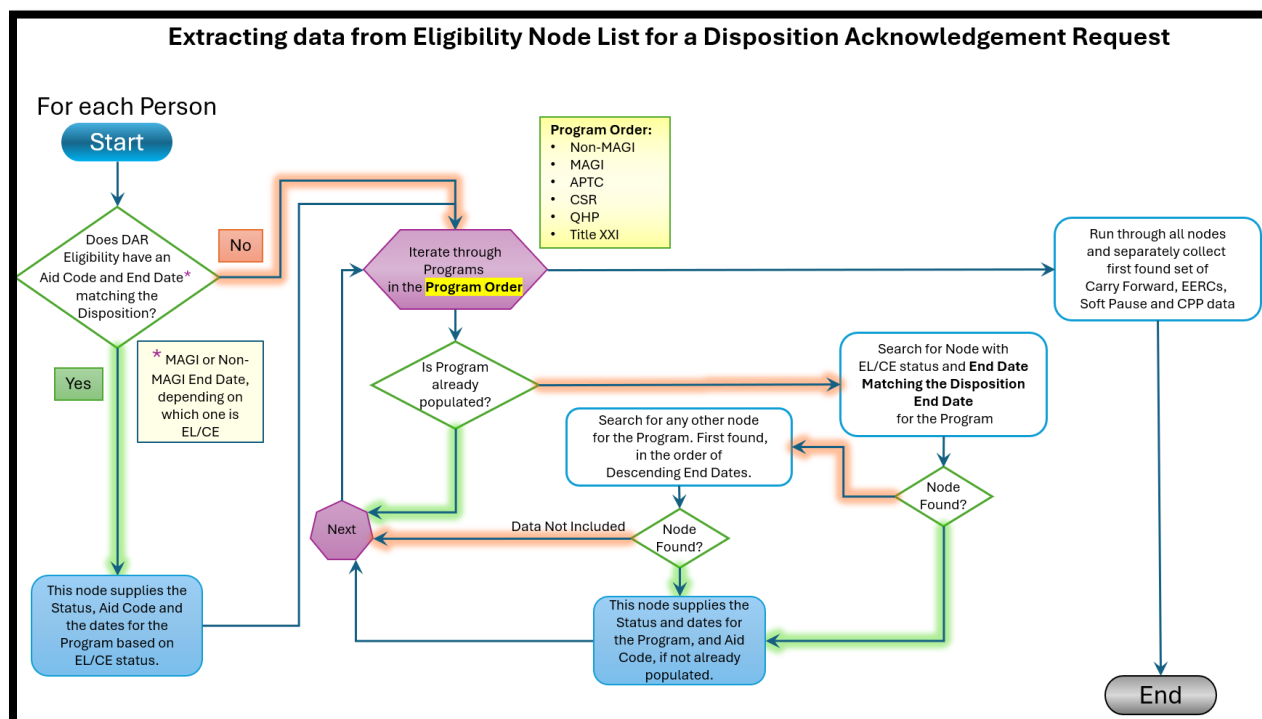


Figure 2.9.2.1.c – Parsing Multiple Eligibility Nodes in Disposition Acknowledgement

2. Generate a holistic Disposition that will include summarized program eligibility information for Medi-Cal, CalWORKs, and CalFresh in a single transaction.
 - a. Only trigger a Disposition from a Regular Accepted and Saved CalWORKs EDBC Run in response to an open CalWORKs referral received from CalHEERS except when the most current Valid DER is a Renewal DER (Run Reason 'RE' or 'RM') not in 'Complete' Status.
 - i. The Disposition triggered from a CalWORKs EDBC Run will update the Status of the Associated MAGI Determination (DER) to 'Complete' only if Regular Medi-Cal EDBC has already been Accepted and Saved against the Associated DER.
- Note:** The exception for Renewal DER is added above to protect against closing CalHEERS Renewal Mode prematurely from a Disposition triggered by a CalWORKs EDBC Run.

- b. Only trigger a Disposition from a Regular Accepted and Saved CalFresh EDBC Run in response to an open CalFresh referral received from CalHEERS except when the most current Valid DER is a Renewal DER (Run Reason 'RE' or 'RM') not in 'Complete' Status.
 - i. The Disposition triggered from a CalFresh EDBC Run will update the Status of the Associated DER to 'Complete' only if Regular Medi-Cal EDBC has already been Accepted and Saved against the Associated DER.

Note: The exception for Renewal DER is added above to protect against closing CalHEERS Renewal Mode prematurely from a Disposition triggered by a CalFresh EDBC Run.

- c. Only trigger a Disposition from a Regular Accepted and Saved Medi-Cal EDBC Run when:
 - i. The Associated DER for the Benefit Period does not have a Disposition in 'Sent' or 'CalHEERS Processed' Status.
 - ii. There is a change in aid from the previous Disposition in 'Sent' or 'CalHEERS Processed' Status for the Associated DER that needs to be communicated to CalHEERS. (See 2.9.2.2.e)
- d. Update the Disposition generation logic to include every person on the Associated DER and populate up to one Medi-Cal, CalWORKs, and CalFresh program status and aid code as follows:
 - i. CalWORKs information:
 - 1. Consider the Status and Role from the latest Accepted and Saved Regular EDBC for the program, based on EDBC Run Date, Created On Timestamp:
 - a. If the Person is Active or Ineligible MEM/MMO, send Eligible with the Aid Code.
 - b. If the Person is Denied, send Ineligible.
 - c. If the Person is Discontinued, send Discontinued.
 - d. For any other Status/Role combination, send Ineligible.
 - ii. CalFresh information:
 - 1. Consider the Status and Role from the latest Accepted and Saved Regular EDBC for the program, based on EDBC Run Date, Created On Timestamp:
 - a. If the Person is Active or Ineligible MEM, send Eligible with the Aid Code.
 - b. If the Person is Denied, send Ineligible.
 - c. If the Person is Discontinued, send Discontinued.
 - d. For any other Status/Role combination, send Ineligible.

iii. Medi-Cal information:

1. If there is no Medi-Cal application for the Person only populate the CalSAWS/CalHEERS Person linkage, otherwise consider the latest Aid Code, Status, and Role from the latest Accepted and Saved Regular EDBC for all Program Blocks:
 - a. If there is a primary Aid Code, consider Eligible with the Aid Code.
 - b. If there is no primary Aid Code and the status is Denied, consider Ineligible.
 - c. If there is no primary Aid Code and the status is Discontinued, consider Discontinued.
 - d. If there is no primary Aid Code and the status is Active FRI/UP/MEM, consider Discontinued if **an Aid Code was previously communicated to CalHEERS effective for the prior Benefit Month**, otherwise consider Ineligible.
 - e. If they are Pending, consider Pending.
2. The hierarchy to follow for determining which Status and Aid Code to send is as follows:
 - a. If there is a Primary Aid Code (Medi-Cal Benefit Category/Scope (CT184_RT02) is not Secondary and eHIT Exclude (CT184_RT31) is not Yes), send Eligible with the Aid Code.
 - i. If the person is an Active MEM on more than one Primary Aid Code choose the Primary Aid Code based on the following hierarchy:
 1. MAGI Aid Code (CT184_RT20) (Yes over No/Blank).
 2. MEC Aid Code (CT184_RT33) (Yes over No/Blank).
 3. MEDS Segment (CT184_RT14). (Primary over other-non-Primary)
 4. Medi-Cal Benefit Category/Scope (CT184_RT02) (Full over Restricted over Limited).
 5. Latest Aid Code based on EDBC Run Date, Created On Timestamp.
 - b. If there is Pending, send Pending.
 - c. If there is Discontinued, send Discontinued.
 - d. If there is Denied, send Ineligible.

- e. When comparing against a previous Disposition for the Associated DER, only trigger a new Disposition from EDBC when there are any of following detected changes in aid for the program:
 - i. For CalWORKs: None.
 - ii. For CalFresh: None.
 - iii. For Medi-Cal: Only when at least one Associated DER individual is on MAGI or Pending Medi-Cal in the previous Disposition and/or triggering EDBC and either of the following occurs:
 - 1. Any change in aid code or status occurs for the MAGI or Pending Medi-Cal Person.
 - 2. Any change in Non-MAGI MEC occurs.
- f. Do not trigger a Disposition under any of the following scenarios:
 - i. When any Person's Requested Medi-Cal Type is 'Minor Consent' (CT319_C1, C2, C3, C4).
 - ii. When the triggering EDBC's Run Reason is 'Soft Pause/Non-RE' (CT744_SP).
 - iii. When the triggering EDBC's Program Status Reason is 'Inter-County Transfer' (CT73_85).
 - iv. When the triggering EDBC's Program Status Reason is 'Worker Initiated-Skip CalHEERS' (CT73_WB).
 - v. When the Associated DER's Initiated Date is before July 29, 2019.
- g. Refactor existing Disposition triggering logic to no longer consider any of the following:
 - i. Triggering Medi-Cal EDBC Run Reason is 'Rescind' (CT744_RS) – This will allow CalSAWS to trigger a Disposition if Medi-Cal EDBC Run Reason is 'Rescind' and all other criteria is met to send a Disposition.
 - ii. Activation Indicator 'MAGI - Eligibility Rules' (CT406_MR_RT01).
 - iii. Deprecated Requested Medi-Cal Types for 'Foster Care' (CT319_FC, FO).
 - iv. Deprecated Requested Medi-Cal Type 'No Potential MAGI' (CT319_NM).

Testing Note: Points **ii**, **iii**, and **iv** above are code refactors that do not have specific testable scenarios.
- h. Add a new Disposition Source (CT10833_PE) of 'Pending Eligible on DER' to be used when Dispositions are triggered automatically by MAGI Determinations moving to 'Reviewed' Status that only have MAGI Pending Eligible persons.
 - i. The Worker Information populated on the Disposition transaction will be from the Program assigned on the MAGI Referral Detail Page of the Associated DER.
 - ii. Initial Dispositions against MAGI Determinations that have everyone as MAGI Pending Eligible will not include any eligibility information as those Dispositions are only intended to communicate Person Number linkage to CalHEERS.

- i. Add a new Disposition Source (CT10833_ED) of 'Disposition is triggered by EDBC' to be used when Dispositions are triggered automatically by EDBC.
 - i. The Worker Information populated on the Disposition transaction will be from the Program of the triggering EDBC Run.
- j. Add a 10-minute delay from the moment a Disposition request is put in the queue so as to avoid sending extraneous Dispositions.
 - i. If an automated Disposition request is put in the queue within the 10-minute delay, reset the timer.
 - ii. If a manual Disposition request is put in the queue within the 10-minute delay, the delay is removed and all the queued requests are sent unless a Disposition was generated less than 10 minutes ago.

3. Include an Ineligible/Discontinuance (IE/DS) Status Reason on the Disposition for Medi-Cal IE/DS.

- Create a code category mapping for the new Disposition eHIT field.
- Populate the IE/DS Status Reason for the Medi-Cal Disposition members that are Ineligible or Discontinued based on the latest EDBC Program Person Status or Role Reason:

PROGRAM PERSON STATUS/ROLE REASON (CALSAWS CODE)	IE/DS STATUS REASON (EHIT CODE)
Application Opened in Error (09)	Application Opened in Error (09)
Child Applied for Self (CR)	Child Applied for Self (CR)
Deemed Child - Fam ReApp (KI)	Deemed Child - Fam ReApp (KI)
Duplicate Application (10)	Duplicate Application (10)
Failed to Complete Determination (16)	Failed to Complete Determination (16)
Failed to Complete Redetermination (RD)	Failed to Complete Redetermination (RD)
On Aid Another Case (CN)	On Aid Another Case (CN)
Requested Disc. - Written (K4)	Requested Disc. - Written (K4)
Stop Aid for Optional Member (C9)	Stop Aid for Optional Member (C9)
TMC Report Incomplete (CH)	TMC Report Incomplete (CH)
TMC Report Not Recvd (CG)	TMC Report Not Recvd (CG)
Whereabouts Unknown (07)	Whereabouts Unknown (07)
Written Withdrawal (18)	Written Withdrawal (18)
Non-Payment of Premium (63)	Non-Payment of Premium (E4)
Deceased (04)	Deceased (85)
Calif. Residence (05); FTP California Residency (N82); FTP County Residence (Negative Action) (ES); FTP County Residence (RS)	California Residency (IY)
Gets SSI (JW); Gets SSI/SSP (25)	Receives SSI (IZ)
Refused UIB (30); Refused SDI (34); Refused VA (31); Refused Military Ben (35)	Failure to apply for or accept unconditionally available income, i.e., UIB, SDI, Veteran's Benefits (VB)
FTP Other Health Care (JT)	Failure to provide other health insurance information (FH)

PROGRAM PERSON STATUS/ROLE REASON (CALSAWS CODE)	IE/DS STATUS REASON (eHIT CODE)
FTP Third Party Liability (TP)	Failure to comply with Third party Liability (FT)
Didn't Apply Medicare (CM)	Failure to apply for Medicare (FM)
Non Co-Op Chld/Med Supp (DX)	Failure to provide 2.1 Q (Child Support) (FQ)
SSN Enumeration (C4)	Failure to provide or apply for SSN (PN)
FTP Name/Identity (CJ)	Failure to provide identity/name (FN)
Gets AAP (FU); Gets APTC (ZT); Gets CalWORKs (G7); Gets FC (FV); Gets Kin-GAP (FT); Gets RCA (FS); Gets Duplicate Aid (GD)	Gets Duplicate Aid (GD)
Out of the Home (19); Out of the Home - Primary Applicant (73); Out of the Home - Incarcerated (OI)	Out of the Home (OH)

- c. Send 'Duplicate/Hidden Person' (DH) with Medi-Cal 'Ineligible' Status in eHIT if the MAGI person is marked Duplicate or Hidden.
- d. Default to sending 'Other' (OT) in eHIT for any reason not mapped above **after first checking Status Reason for a valid mapping, followed by Role Reason.**

Note: The eHIT Non-Compliance Reason of 'Failure to provide the Veteran's information to complete the MC 05' (FV) is the only valid IE/DS Status Reason not mapped as it is not populated in eHIT outbound to CalHEERS.

CalHEERS Reference Note: Per CalHEERS **BRF01.18** - Eligibility Discontinuance and Negative Action, individuals sent with an IE/DS Status Reason of 'Gets Duplicate Aid', 'Out of Home', or 'Duplicate/Hidden Person' will not be evaluated for Exchange programs. Individuals sent with 'Other' will be evaluated for Exchange and all other Negative Action and Non-Compliance reasons will be evaluated per existing configuration set by CalHEERS.

4. Consume and process CalHEERS BV #203 for stale-dating logic and automate triggering a new Disposition to remediate applicable eligibility periods.
 - a. Save the new Program Period Begin and End Dates being introduced on eHIT Logging transactions for CalHEERS BV #203 for Disposition State-Dating Logic.
 - b. When a Disposition errors out due to CalHEERS BV #203, automatically send a new Disposition based on below flow chart:

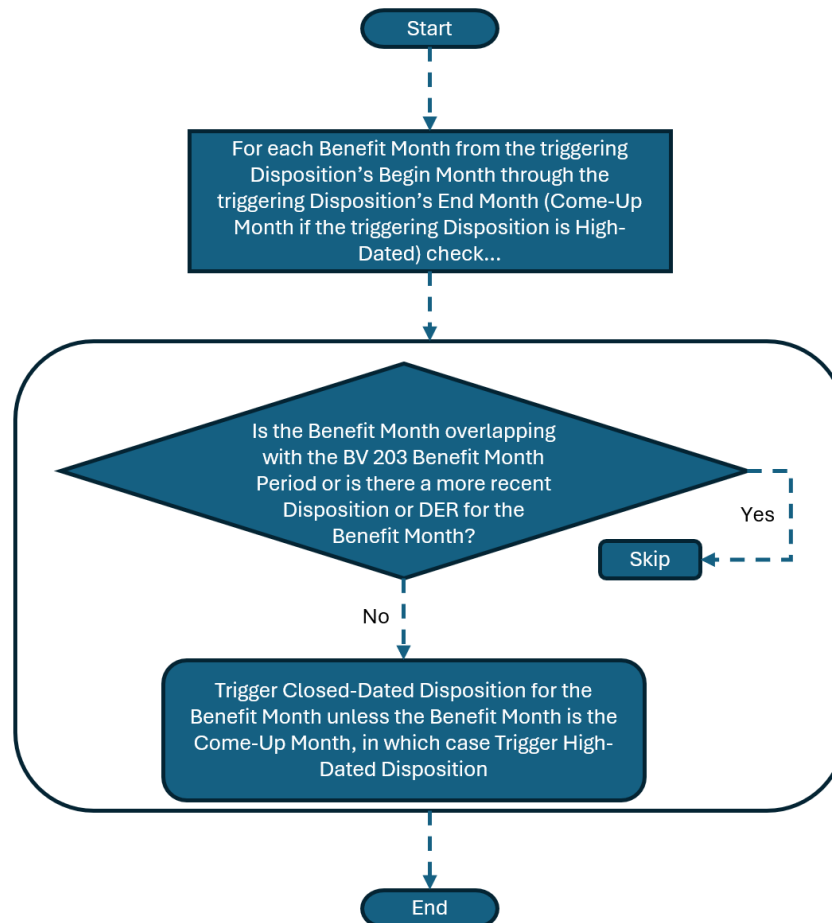


Figure 2.9.2.4.b – Automatic Disposition when CalHEERS BV #203 is Received

- c. When iterating through each month of the Disposition and checking for a more recent Disposition, do not consider Dispositions that are in 'Error' Status.
- d. When iterating through each month of the Disposition and checking for a more recent DER, only consider DERs that are 'Reviewed', 'In Process', or 'Completed Manually' Status.
- e. Add a new Disposition Source (CT10833_SD) of 'Stale-Date BV' to be used when Dispositions are triggered automatically from processing CalHEERS BV #203.
 - i. The Worker Information populated on the Disposition transaction will be from that of the stale-dated Disposition transaction.

5. Allow User Requested Dispositions to communicate effective CalSAWS Case Eligibility information without the need for running EDBC.
 - a. Add a new Disposition Source (CT10833_UR) of 'User Requested' to be used when Dispositions are triggered Manually such as from the new 'MAGI Disposition Update' page.
 - i. The Worker Information populated on the Disposition transaction will be from the user who requested the Disposition.

2.9.3 Interface Partner

CalHEERS

2.9.4 eHIT Schema Version

Version 22 – CalHEERS R25.6 CR 252593 / CalSAWS SCR CA-279552

2.10 Automated Regression Test

2.10.1 Overview

Create new automated regression test scripts to verify navigation to, and display of, the following pages: MAGI Disposition List, MAGI Disposition Detail, MAGI Disposition Update.

Create new automated regression test scripts to verify that a MAGI Disposition Update can be submitted.

2.10.2 Description of Change

1. Create regression scripts to verify basic navigation to, and display of each visible field, on the following pages:
 - a. MAGI Disposition List
 - b. MAGI Disposition Detail
 - c. MAGI Disposition Update
2. Create regression scripts to verify that a user can navigate to the MAGI Disposition Update page and submit a new disposition for an ongoing Medi-Cal case.
3. Create regression scripts to verify that a Page Mapping entry exists for each applicable field on each of the following pages:
 - a. MAGI Disposition List
 - b. MAGI Disposition Detail
 - c. MAGI Disposition Acknowledgement Detail*
 - d. MAGI Disposition Acknowledgement Person Detail*
 - e. MAGI Disposition Update

Technical Note: Page mappings for the MAGI Disposition Acknowledgement Detail and MAGI Disposition Acknowledgement Person Detail pages should be verified by clicking the Page Mapping link from the Homepage. Page mappings for the other pages should be verified by clicking the Page Mapping link from each page.

CalSAWS

California Statewide Automated Welfare System



CA-282061

e-Application Search Results Enhancement

CalSAWS	DOCUMENT APPROVAL HISTORY		
	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
4/14/2025	0.3	Content Revision to add column in exported data to capture CalHEERS Number and update export report mockup	Jennifer Muna

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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

e-Application Search

*- Indicates required fields

e-App Status: *

All

ES/IN:

Search By: *

All

Application Date Range

Begin Date: *

01/01/2025

End Date: *

01/23/2025

e-App Number:

e-App Language:

Advanced Search

Results per Page: 25

Search

Search Results Summary


Results 1 - 25 of 116

1 2 3 4 5 Next

		e-App Number	Applicant	Application	e-App	Case	Worker ID	Zip Code	Programs
	ES/IN	CalHEERS Number	Name	Date	Status	Number			
<input type="checkbox"/>	ES	20002287	Doe, John 33	01/23/2025	Pending Clearance			96120	MC, CF, CW
<input type="checkbox"/>	IN	1031018	Kenobi, Kent 32	01/23/2025	Pending Clearance			90026	MC, CF
<input type="checkbox"/>	No	20002288	Doe, Jane 54	01/23/2025	Data Transfer	L231H56	19DP38AM01	90026	CW
<input type="checkbox"/>	No	1031020	Skywalker, Mark 33	01/23/2025	Transferred to System	L244C89	19DR38NE21	96120	CF

Figure 2.1.1 – e-Application Search Results – Export Icon

2.1.3 Description of Changes

1. Add an Export 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. Example: County: Los Angeles
ES/IN	The Expedited Services or Immediate Need field. This includes the following values: <ul style="list-style-type: none">• All – Default to 'All' if field is left blank. This indicates the report will display all e-Applications with the below ES/IN values.• ES – This indicates the report will display all e-Applications who applied for 'ES' only.• IN – This indicates the report will display all e-Applications who applied for 'IN' only.• ES/IN – This indicates the report will display all e-Applications who applied for 'ES/IN' only.• No – This indicates the report will display all e-applications who did not apply for Expedited Services or Immediate Need. Example: ES/IN: All
e-App Language	The spoken language indicated by the applicant with the available options:

	<ul style="list-style-type: none"> • All – Default to 'All' if field is left blank. This indicates the report will display all spoken languages results. • English – This indicates the report will display all e-Applications with preferred language is English. • Spanish – This indicates the report will display all e-Applications with preferred language is Spanish.
E-App Status	<p>The e-Application status with the available options:</p> <ul style="list-style-type: none"> • All – The report will display all e-Applications, including all below statuses. • Data Transfer – The report will display all e-Applications in 'Data Transfer' status. • GR-Rescission – The report will display all e-Applications in 'GR-Rescission' status. • Not Accepted – The report will display all e-Applications in 'Not Accepted' status. • Pending Clearance – The report will display all e-Applications in 'Pending Clearance' status. • Posted – The report will display all e-Applications in 'Posted' status. • Transferred to System – The report will display all e-Applications in 'Transferred to System' status. <p>Example: E-App Status: Pending Clearance</p>
Search By	<p>As displayed in the e-Application Search page with the following options:</p> <ul style="list-style-type: none"> • All – The report will display all e-applications. Example: Search By: All • Assigned Worker – The report will display all e-Applications assigned to a Worker Id. Display as "Assigned Worker - <Worker ID>". Example: Search By: Assigned Worker – 19AEGR3B00 • 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 • Office – The report will display all e-Applications assigned to a specific Office Id in the county. Display as "Office - <Office Id>". Example: Search By: Office – 23 • Origin – The report will display all e-Applications submitted by a specific entity. Display as "Origin - <Origin Options>". Available options include: <ul style="list-style-type: none"> ○ Anonymous User ○ Community Based Organization

	<ul style="list-style-type: none"> ○ Customer ○ Government Agency <p>Example: Search By: Origin – Customer</p> <ul style="list-style-type: none"> • Program – The report will display all e-Applications submitted for a program. Display as “Program - <Program Name>”. Available values will include the following: <ul style="list-style-type: none"> ○ CalFresh ○ CalWORKs ○ Disaster CalFresh ○ General Assistance/General Relief (GR) ○ Medi-Cal <p>Example: Search By: Program - CalWORKs</p> <ul style="list-style-type: none"> • 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>”. Example: Search By: Zip Code - 94320
Begin Date	This is the begin date entered on the e-Application Search page. Format: MM/DD/YYYY Example: 01/01/2025
End Date	This is the end date entered on the e-Application Search page. Format: MM/DD/YYYY 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 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: <ul style="list-style-type: none"> • Yes • 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: <ul style="list-style-type: none"> • ES

	<ul style="list-style-type: none"> • IN • ES/IN • No
e-App Number	This column will contain the e-Application Number
CalHEERS Number	This column will contain the associated CalHEERS case number when applicable.
Application Date	This column will contain the date the application was submitted with format MM/DD/YYYY
e-App Status	<p>This column will contain the e-Application status with the available values:</p> <ul style="list-style-type: none"> • All • Data Transfer • GR-Rescission • Not Accepted • Pending Clearance • Posted • Transferred to System
Applicant Name	<p>This column will contain the Applicant's name in the following format as displayed on the e-Application Search Results Summary:</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Last Name, First name 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: <ul style="list-style-type: none"> • Anonymous User • Community Based Organization • Customer • 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 Results Export Report Mockup	e-Application Search Export Report  e-Application Search Result Export Mockup e-Application Search Results Export Report  e-Application Search Results Export Report



Design

CA-282449

ACL 24-87 Mass Mailer for Extension of Water Pilot Program

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Phong Xiong, Jimmy Tu	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/02/2025	1.0	Initial Draft	Phong Xiong, Jimmy Tu
04/23/2025	2.0	Content Revision – updated section 2.2.2 to reflect the same query conditions as fiscal query to find population for the extension	Phong Xiong

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CA-282449 – ACL 24-87 Mass Mailer for Extension of Water Pilot Program

1 OVERVIEW

As per All County Letter (ACL) 24-87, the Water Pilot Program has been extended for Kern County once more.

1.1 Current Design

The Water Pilot for Kern County started on March 1, 2022 and was originally scheduled to end 2/28/2023, depending on household caseload and available funding. Due to available funds, the Pilot was extended from 3/1/2023-10/31/2023. Now with the additional funding provided, the Pilot will be extended from 11/1/2023 - 6/31/2025 for participating households.

Assembly Bill 161, section 58, extends the Water Pilot until allocated funding expires. Pilot was originally scheduled to end 10/31/23 and was extended through June 30, 2025. This new extension will require the CDSS to send another informing notice similar to CF 304E to participating pilot households in Kern County.

Assembly Bill 161, Section 58 extends the CalFresh Water Pilot (Pilot) until the expiration of allocated funding for the pilot program or September 30, 2025, whichever is later. Participants will receive an extension notice CF 304F. The existing discontinuance notice (CF 304C) will be sent to households when the Pilot ends.

1.2 Requests

1. Send the CF 304F Notice of Water Pilot Extension before June 2025.
2. Update water pilot benefits logic to capture the extension.

1.3 Overview of Recommendations

1. Add the new CF 304F Notice of Water Pilot Extension form in CalSAWS in English and Spanish.
2. Mass mail the CF 304F Notice of Water Pilot Extension form before June 2025.
3. Create new Auxiliary Authorization Record for Water Pilot Benefits.
4. Update Monthly Water Pilot Discontinuance Sweep to scan for the latest approved Auxiliary Authorization Record.

1.4 Assumptions

1. Households currently participating in the Pilot will continue to receive Pilot benefits through the extension, as long as they remain otherwise eligible. Eligible CalFresh Water Pilot ZIP codes are 93241 (Lamont), 93220 (Edison),

93243 (Gorman-Lebec), 93311 (Bakersfield), 93387 (Bakersfield), 93386 (Bakersfield), 93528 (Johannesburg), and 93560 (Rosamond). No additional ZIP codes or households will be added to the Pilot with the implementation of the extension.

2. The only county receiving the Pilot benefits is Kern County. There are no impacts to the other 57 counties.
3. Auxiliary Authorization records in CalSAWS require an end date and have a maximum range of one year. Due to this policy not having a specific end date, the project will need to notify CalSAWS when funding for the Water Pilot program is ending for SCR CA-287437 to end date water pilot records.

2 RECOMMENDATIONS

2.1 Add New CF 304F Form Recommendation

2.1.1 Overview

The CF 304F form is used to notify participating Pilot households of the extension. The notice will inform households of the extension date and details.

State Form: CF 304F (10/24)

Programs: CalFresh

Attached Forms: NA Back 9

Forms Category: Forms

Template Repository Visibility: All Counties*

Languages: English and Spanish

**Note: The form is visible to all counties; however, only Kern County has the water pilot program. Please see assumption #2.*

2.1.2 Form/NOA Verbiage

Create Form XDP

A new Form XDP will be created for the new CF 304F form.

Form Header: CalSAWS Standard Header (Header_1_EN)

Form Title (Document List Page Displayed Name): NOTICE OF CALFRESH WATER PILOT EXTENSION

Form Number: CF 304F

Include NA Back 9: Yes

Imaging Form Name: NOTICE OF CALFRESH WATER PILOT EXTENSION

Imaging Document Type: Notification/NOA

Imaging Case/Person: Case

Form Mockups/Examples: Please see supporting document #1

Note: The NA Back 9 is not included in the mockup in supporting document #1.

2.1.3 Form/NOA Variable Population

The header will be populated with the existing population logic for the CalSAWS Standard Header.

The NA Back 9 will be populated with the existing population logic.

There is no variable population logic for the body of the CF 304F.

2.1.4 Form/NOA Generation Conditions

1. Add Form Generation

The CF 304F will only be generated once via batch for a one-time mass mailer (see section 2.2).

2. **Add Form to Template Repository**

This form will be added to the Template Repository.

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

3. **Add Form Control**

An imaging barcode will be added to the CF 304F.

Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

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

The CF 304F will have the following printing and mailing requirements:

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

Mailing Requirements:

Mail-To (Recipient): Mailed to the person selected from Customer Name dropdown in Document Parameters. For the purposes of the mass mailer (please see section 2.2), mail to the Primary Applicant of the case.

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelop Type: Standard Size Mail

Return Envelop Type: N/A

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: N/A

Electronic Signature (IVR/Text): N/A

Check to Sign: N/A

Post to Self Service Portal (SSP): Yes

2.2 Mass Mailer to Send the CF 304F Form

2.2.1 Overview

This mass mailer will send out the new CF 304F form from section 2.1 to current Pilot customers.

2.2.2 Description of Change

Run a one-time mass mailer before June 1st, 2025, to send the CF 304F to the primary applicant of the case associated to the AUX_PMT table record for CalFresh Safe Water Pilot Benefits in Kern County when the following conditions are met:

1. The program is CalFresh,
2. The program status is Active,
3. The case is receiving 'CalFresh Safe Water Pilot Benefits' (AUX_PMT table, PAY_CODE = 'SW'),
4. The End Date in the AUX_PMT table = '06/30/2025' ~~The Discontinuance Date in the AUX_PMT table = Null Date~~
5. The Discontinuance Reason in the AUX_PMT table is null.

For the cases identified, insert the following records into SYS_TRANSACTION.

Field to Populate	Population for Form
Case Id	The case Id associated to the current CF program.
Program Id	The program Id of the current CF program.
Person Id	The primary applicant of the current CF program for the case associated to the Water Pilot AUX_PMT record.
Type Code	FR
Sub Type Code	The sub type code used for one-time mass mailer.
Effective Date	Batch Date

***Note:** Case count is roughly 1,684 impacted cases. The form will be mailed to 1 primary applicant per case.

2.3 Water Pilot Restoration Batch Job (PB15F138)

2.3.1 Overview

This section will update the Water Pilot Restoration batch job to set the end date of Auxiliary Payment Records to 06/31/2026.

2.3.2 Description of Change

1. Update Water Pilot Restoration Batch job to end date records as of 06/31/2026.

2.3.3 Execution Frequency

No Change.

2.3.4 Key Scheduling Dependencies

No Change.

2.3.5 Counties Impacted

No Change.

2.3.6 Category

No Change.

2.3.7 Data Volume/Performance

No Change.

2.3.8 Failure Procedure/Operational Instructions

No Change.

2.4 Water Pilot Discontinuance Batch Job (PB15F135)

2.4.1 Overview

This section will update the Water Pilot Discontinuance batch job to set the end date of Auxiliary Payment Records to 06/31/2026.

2.4.2 Description of Change

1. Update Water Pilot Discontinuance Batch job to end date records as of 06/31/2026.

2.4.3 Execution Frequency

No Change.

2.4.4 Key Scheduling Dependencies

No Change.

2.4.5 Counties Impacted

No Change.

2.4.6 Category

No Change.

2.4.7 Data Volume/Performance

No Change.

2.4.8 Failure Procedure/Operational Instructions

No Change

2.5 Fiscal: Data Change Request

2.5.1 Overview

This section is to create a new auxiliary payment record for Kern's Water Pilot Extension.

2.5.2 Description of Change

1. One Time DCR to create a new Auxiliary Authorization Record to issue Water Pilot Benefits.
 - a. Customer Non-Benefit: None
 - b. Program: CalFresh
 - c. Aid Code: 09 – CalFresh
 - d. Amount: \$50.00
 - e. Payee Type: Person
 - f. Name: CF Program Payee
 - g. Issuance Method: EBT
 - h. Issuance Immediacy: Routine
 - i. Begin Date: 07/01/2025
 - j. End Date: 06/30/2026.
 - k. Issuance Business Day: 10
 - l. Only Issue after Regular Benefit is created: Yes
 - m. Federal Person(s): 0
 - n. Non-Federal Person(s): 0

2.5.3 Estimated Number of Records Impacted/Performance

~1,684 records.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Forms	NOTICE OF CALFRESH WATER PILOT EXTENSION Mockup	CF304F_EN.pdf

CalSAWS

California Statewide Automated Welfare System



CA-284415 Update the Batch Jobs to include the Counties opting into the GA/GR Automated Solution

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Soundarya Ramesh	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/28/2025	1.0	Initial draft	Soundarya Ramesh
04/24/2025	1.0	Remove County 36 from batch jobs which are not applicable for San Bernardino county due to their opting out.	Soundarya Ramesh

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CA-284415 – Update the Batch Jobs to include the Counties opting into the GA/GR Automated Solution

1 OVERVIEW

CalSAWS GAGR Automated Solution (AS) batch jobs are configured only for existing CalSAWS GAGR AS counties who previously opted into the program functionality. This SCR expands the scope of the GAGR AS batch jobs to include counties not yet opted into the GAGR AS program, so that when a new county does onboard into the GAGR AS program, the GAGR AS batch job functionalities will be available for them to utilize.

1.1 Current Design

The current design of the CalSAWS GAGR Automated Solution (AS) batch jobs are limited to existing CalSAWS GAGR AS counties already opted into to functionality and the GAGR Managed, Non-Managed Counties are not included in the batch jobs. This SCR proposes updating the GAGR AS batch jobs to include 39 additional counties [as listed in section 2.1.6], allowing them to access and use the existing functionality for all GAGR AS batch jobs.

1.2 Requests

The request is to opt in 39 counties for all the existing CalSAWS GAGR Automated solution(AS) batch jobs, except where noted (**) for San Bernardino County since they opted out of some batch job functionality while onboarding into CalSAWS GAGR AS program during design of this SCR. Update 24 batch jobs (non-CC) to include the 39 Counties [as listed in section 2.1.6], opting into the CalSAWS GA/GR AS program and regression test 100 batch jobs after opting in.

1.3 Overview of Recommendations

1. Create BPCR for 24 batch jobs to opt in 39 counties, except where noted (**) for San Bernardino County since they opted out of some batch job functionality while onboarding into CalSAWS GAGR AS program during design of this SCR.
2. Create BSCR for county specific batch jobs for PBXXE261 and PBXXE262 for 39 counties.

1.4 Assumptions

1. Respective county admins should activate the required County rules from CalSAWS GAGR AS admin page and the following batch job will run every day to sync the pending transaction updates.

Batch Job Number	Description
PB00C114	Rules Admin Batch. Rules Admin table sync up for the pending transaction updates on the County Rules Admin page.

2. Respective county admins should opt in for Indigent burial through CalSAWS GAGR AS admin page and the following batch job will pick the records as per the existing functionality.

Batch Job Number	Description
PB00E920	<p>Indigent Burial Batch EDBC Sweep. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have an Indigent Burial result code of pass within the current benefit month. The Indigent Burial result will fail in the following month as this is only valid for one month and should not continue to be afterwards.</p> <p>**Not Applicable for San Bernardino County.</p>

2 RECOMMENDATIONS

2.1.1 Create BPCR for 24 batch jobs to include 39 counties.

2.1.2 Overview

Opt in the counties listed in section 2.1.6 for all the existing 24 GAGR Automated solution(AS) batch jobs and test all 100 batch jobs to verify is processing records for all the opted in counties.

2.1.3 Description of Change

1. Create a BPCR for the following 24 batch jobs to opt in 39 counties, except where noted (**) for San Bernardino County since they opted out of some batch job functionality while onboarding into CalSAWS GAGR AS program during design of this SCR.

Batch Job Number	Description
PB00E267	Appointment Admin Batch. ADMIN_APPT_DETL_TRANSACTION table sync up for the pending transaction updates on the Appointments admin page.
PB00R6810	Non-Compliance and Sanction Summary Admin Batch. ADMIN_NON_COMPLY_TRANSACTION table sync up for the pending transaction updates on the Sanctions admin page.
PB00E918	AidToPayMonth Batch EDBC Sweep. Fetch the GR active cases that have a last aid date populated to discontinue GA/GR Automated solutions (AS) program the following month through EDBC sweep with sub type code CT942_LAD_Last Aid Date. **Not Applicable for San Bernardino County.

PB00E919	Return to Residence Batch EDBC Sweep. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Return to Residence aid code (9G) as of the end of the benefit month. We will discontinue in the following month as this Return to Residence eligibility is only valid for one month and should not continue to be active afterwards.
PB00E113	Periodic Report Not Returned. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Periodic Report with a customer report status of Sent in the current effective month. We will attempt to discontinue the case based on the EDBC results.
PB00E114	<p>SAR Periodic Report Not Returned. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a SAR Periodic Report with a customer report status of Sent in the current effective month. We will attempt to discontinue the case based on the EDBC results.</p> <p>**Not Applicable for San Bernardino County.</p>
PB00E115	Periodic Report Incomplete. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Periodic Report with a customer report status of Incomplete in the current effective month. We will attempt to discontinue the case based on the EDBC results.
PB00E116	<p>SAR Periodic Report Incomplete. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a SAR Periodic Report with a customer report status of Incomplete in the current effective month. We will attempt to discontinue the case based on the EDBC results.</p> <p>**Not Applicable for San Bernardino County.</p>
PB00E118	No Show To Case Maintenance Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Case Maintenance Appointment that was not attended and resulted in a no show to trigger EDBC.

PB00E119	No Show To Client Referral Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Client Referral Appointment that was not attended and resulted in a no show to trigger EDBC.
PB00E124	No Show To Employment Services Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have an Employment Services Appointment that was not attended and resulted in a no show to trigger EDBC.
PB00E170	No Show To Hearing Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Hearing Appointment that was not attended and resulted in a no show to trigger EDBC.
PB00E257	No Show To Medical Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Medical Appointment that was not attended and resulted in a no show to trigger EDBC.
PB00E259	No Show To RE Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a RE Appointment that was not attended and resulted in a no show to trigger EDBC.
PB00E260	No Show To Verification Appointment. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a Verification Appointment that was not attended and resulted in a no show to trigger EDBC.
PB00E263	GR General Verification Trigger. Update the General Verification Batch EDBC Sweep to include the GA/GR AS program with status reason as 'FTP-Verification (GR)' for the GA/GR Automated EDBC/CC Counties.
PB00E266	Redetermination Overdue. This Batch EDBC Sweep will retrieve GA/GR Automated EDBC/CC cases that have a GR Redetermination that is overdue. We will attempt to discontinue the case based on the EDBC results with status reason as Failed to Complete Redetermination.

PB00E264	GAGR Recertification Appointments Batch. This batch job is for automated RE Appointments for GR programs. The batch appointment logic will be similar to the existing CalSAWS logic.
PB00E486	<p>GAGR Deregistration Batch. The GA/GR Employment Services Deregistration batch will deregister the Employment Services program for the GA/GR AS program EDBC/CC Solution. This batch will also auto close active Employment Services associated activities if applicable.</p> <p>**Not Applicable for San Bernardino County.</p>
PB00R6809	GA/GR Correspondence Master Data Confirm Batch. The GA/GR Correspondence Master Data Confirmation Inbound Web Service will be invoked from the GA/GR Correspondence Service to confirm GA/GR Correspondence Service Master data is successfully applied in the Service repository.
PB00R6806	CalSAWS Reference Data Batch. CalSAWS reference Data Outbound Web Service will be invoked from the GA/GR Correspondence Service to retrieve CalSAWS Reference Data from the lookup tables.
PBXXE261	GR Time Limit 90 Day Threshold For Month Clock. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a time-limit clock that is nearing the 90 days/ (84 Days for Tulare County) threshold.
PBXXE262	GR Time Limit 90 Day Threshold For Day Clock. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a time-limit clock that is nearing the 90 days / (84 Days for Tulare County) threshold.

PB00E256	GA/GR Sanction Admin. The Sanction Type Detail batch will process each requested sanction type change that are listed on the pending updates section of the Sanction Type Detail page. This job will process all the pending records from ADMIN_SANCTN_DETL_TRANSACT table to ADMIN_SANCTN_DETL table utilizing the effective dating framework to check for any duplicates timelines for the same records.
----------	--

2.1.4 Execution Frequency

Same as existing

2.1.5 Key Scheduling Dependencies

Same as existing

2.1.6 Counties Impacted

Add

- .02 Alpine
- .03 Amador
- .04 Butte
- .05 Calaveras
- .06 Colusa
- .21 Marin
- .22 Mariposa
- .23 Mendocino
- .24 Merced
- .25 Modoc
- .26 Mono
- .27 Monterey
- .28 Napa
- .29 Nevada
- .20 Madera
- .32 Plumas
- .33 Riverside
- .35 San Benito
- .36 San Bernardino ** except where noted
- .39 San Joaquin
- .45 Shasta
- .46 Sierra
- .47 Siskiyou
- .08 Del Norte

- .09 El Dorado
- .11 Glenn
- .12 Humboldt
- .13 Imperial
- .14 Inyo
- .15 Kern
- .16 Kings
- .17 Lake
- .18 Lassen
- .50 Stanislaus
- .51 Sutter
- .52 Tehama
- .53 Trinity
- .55 Tuolumne
- .58 Yuba along with existing counties.

2.1.7 Category

Same as existing

2.1.8 Data Volume/Performance

N/A

2.1.9 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.)

2.2 BSCR for county specific batch jobs for PBXXE261 and PBXXE262 for 39 counties.

2.2.1 Overview

Create BSCR to schedule 2 county specific batch jobs for 39 counties.

PBXXE261	GR Time Limit 90 Day Threshold For Month Clock. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a time-limit clock that is nearing the 90 days/ (84 Days for Tulare County) threshold.
----------	---

PBXXE262	GR Time Limit 90 Day Threshold For Day Clock. This Batch EDBC Sweep will retrieve GA/GR AS program EDBC/CC cases that have a time-limit clock that is nearing the 90 days / (84 Days for Tulare County) threshold.
----------	--

2.2.2 Description of Change

Create BSCR to schedule 2 county specific batch jobs for 39 counties.

2.2.3 Execution Frequency

Same as existing PBXXE261 and PBXXE262.

2.2.4 Key Scheduling Dependencies

Same as existing PBXXE261 and PBXXE262

2.2.5 Counties Impacted

Add

02	Alpine
.03	Amador
.04	Butte
.05	Calaveras
.06	Colusa
.21	Marin
.22	Mariposa
.23	Mendocino
.24	Merced
.25	Modoc
.26	Mono
.27	Monterey
.28	Napa
.29	Nevada
.20	Madera
.32	Plumas
.33	Riverside
.35	San Benito
.36	San Bernardino
.39	San Joaquin
.45	Shasta
.46	Sierra
.47	Siskiyou
.08	Del Norte
.09	El Dorado
.11	Glenn

- .12 Humboldt
- .13 Imperial
- .14 Inyo
- .15 Kern
- .16 Kings
- .17 Lake
- .18 Lassen
- .50 Stanislaus
- .51 Sutter
- .52 Tehama
- .53 Trinity
- .55 Tuolumne
- .58 Yuba along with existing counties.

2.2.6 Category

Same as existing

2.2.7 Data Volume/Performance

N/A

2.2.8 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
N/A		

4.2 Migration Requirements

N/A

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A