



California Statewide Automated Welfare System



CA-203576

**Add a Retro Medi-Cal NOA for Denial for
Over MAGI Income**

[Date]

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Owner	Jose Gonzales
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	Reviewer	
	Approver	
APPROVAL DATE	APPROVED VERSION	REVIEWED AND APPROVED BY

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CA-203576 Add a Retro Medi-Cal NOA for Denial for Over MAGI Income

1 OVERVIEW

This SCR will add a new Retro Medi-Cal Denial NOA for Over MAGI Income.

1.1 Current Design

Currently, counties manually generate the NOAs for the scenario.

1.2 Requests

Add new reason fragment when an individual is denied Medi-Cal due to being over MAGI income limits in a retroactive month.

1.3 Overview of Recommendations

Add new reason fragment when an individual is denied Medi-Cal due to being over MAGI income limits in a retroactive month.

1.4 Assumptions

1. Per existing functionality, a GEN 1365 is included in the same envelope with the English version when the participant's primary language is a language other than the currently supported languages for this NOA.
2. This will not change the existing Medi-Cal NOAs for non-Retro denials.
3. SCR CA-283578 will add the missing action, reason and message verbiage to generate this NOA in Hindi, Thai, Mein, Punjabi, Ukraine, and Japanese.

2 RECOMMENDATIONS

2.1 Add a New NOA Action Fragment Recommendation

2.1.1 Overview

Add new denial action fragment.

State Form/NOA: MC 239 Retro MAGI Denial – Over Income

Program(s): MediCal

Action Type(s): Denial

Fragment Level: Person

Repeatable: Yes

Languages: English, Spanish

2.1.2 Form/NOA Verbiage

Create Fragment XDP

Create a new denial action.

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting*
Static	This notice applies to the following individual(s): <Names>	Arial 10

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

2.1.3 Form/NOA Variable Population

Add Fragment Variable Population

Variable Name	Population	Formatting*
<Names>	Populate the name or names that were denied for over income. Ex: "Jane Doe" Ex2: "Jane Doe", "John Doe"	Arial 10

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

Variables Requiring Translations: N/A

2.1.4 Form/NOA Generation Conditions

1. Add Fragment Generation

Generate this action fragment for retro denial for MAGI over income.
Ordering on NOA: This action fragment will generate **before** the reason from Recommendation 2.2

2.2 Add a new Medi-Cal NOA MAGI Reason Fragment

2.2.1 Overview

This effort will add a new NOA reason for MAGI Retro denial due to being over MAGI income limits.

State Form/NOA: MC 239 Retro MAGI Denial – Over Income

NOA Template: H_NOA_TEMPLATE (Id: 3033)

Program(s): (MAGI/mixed) Medi-Cal

Action Type(s): Denial

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Includes standard NA Back 9 variable population: Yes

Forms/NOAs Generated with this NOA: N/A

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

Note: See Supporting Documents#1 for New Reason Threshold Language Verbiage

2.2.2 Form/NOA Verbiage

Create Fragment XDP

Add a new reason for MAGI Medi-Cal denial when over the income limit.

NOA Mockups/Examples: See Supporting Documents #2

Description	Text	Formatting*
<Static Section>	<p>"You do not qualify for Medi-Cal because:</p> <p>Your household income was above the allowed amount. We counted your household size and income for <eligibility month year> to make our decision. For Medi-Cal:</p> <ul style="list-style-type: none">• Your household size was <MAGI_SIZE>.• Your monthly household income was \$<MAGI_INCOME>. <p>The monthly Medi-Cal income limit based on your age and household size is \$<MAGI_INCOME_LIMIT>. Your income was above this limit, so you do not qualify for Medi-Cal for that month."</p>	Arial Font 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

Variable Name	Population	Formatting*
<application date>	Populates with participant's application date Ex. 01/2024	Bold Arial Font Size 10
<benefit month>	Populates with the EDBC benefit's month Ex. 01/2024	Bold Arial Font Size 10
<MAGI_SIZE>	Populates with the MAGI size	Bold Arial Font Size 10
<MAGI_INCOME>	Populates MAGI Income Ex. \$1000	Bold Arial Font Size 10
<MAGI_INCOME_LIMIT>	Populates MAGI Income Limit	Bold Arial Font Size 10

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

Variables Requiring Translations: N/A

2. Add Fragment Regulations

Senate Bill (SB) 1341 (Chapter 846, Statutes of 2014) modified Section 10823 of the Welfare and Institutions Code

3. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: MAGI Denial

NOA Title: MC_DN_NOA_TYPE

Title ID: 3110

NOA Title Requires Translations: N/A

NOA Footer: MC 239 Retro MAGI Denial – Over Income

NOA Footer Requires Translations: **N/A**

2.2.4 Form/NOA Generation Conditions

1. Add Fragment Generation

Generate a Medi-Cal Denial NOA with this new reason fragment when:

an applicant is applying for MAGI Medi-Cal benefits for any of the 3 retroactive months, determined over the MAGI income limit for their household size, and are not granted Non-MAGI benefits for those 3 retroactive months.

Individuals who are not eligible for MAGI Medi-Cal, but who are approved for Non-MAGI Medi-Cal in a month prior to the application month, must be sent only the NOA that provides the final Non-MAGI Medi-Cal eligibility determination for that month.

If the case/person is denied for MAGI due to being over MAGI income limits and denied Non-MAGI for any reason, they would receive both the MAGI retro over income NOA (MC 239 - Retro MAGI Denial Over Income) and the appropriate Non-MAGI denial NOA.

Action Fragment: H_DN_ACTION2

Message Fragment: H_DN_MESSAGE1, MC_DN_BIC_MESSAGE

Ordering on NOA: N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA Threshold Languages	CA-203576 New Reason Threshold Languages	CA-203576 New Reason Threshold Languages.xlsx
2	NOA	MC 239 - Retro MAGI Denial Over Income Mockup	MC 239 - Retro MAGI Denial Over Income Mockup.pdf

Design

CA-223784

Differentiate Positive and Negative Benefit Change
NOAs

[Date]

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Owner	Client Correspondence
	Preparer	Maria Jensen
	Reviewer	Tiffany Huckaby
	Approver	
APPROVAL DATE	APPROVED VERSION	REVIEWED AND APPROVED BY

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1 OVERVIEW

SCR CA-255689 'Create a new mail priority for Mass Mailers and COLA Documents' introduced a new mail priority of '08', in the CalSAWS system. However today that priority is manually applied. This SCR will add a flag that will be used to set the mail priority appropriately.

1.1 Current Design

The CalSAWS System does not differentiate between positive and negative Benefit Change (BC) NOAs. This functionality is useful when emergency changes are made and there is a need to suppress Positive BC NOAs but send Negative BC NOAs and Discontinuance NOAs generated by batch.

1.2 Requests

Update the CalSAWS System to differentiate between Positive and Negative BC NOAs for CalFresh and CalWORKs.

Cases with Negative BC NOAs should be bundled separately from those with Positive BC NOAs, to be able to target and send negative NOAs alone to meet the 10-day cutoff. This can be done by setting positive NOAs to priority 8, however for these NOAs there is no easy way to determine which is positive versus negative.

1.3 Overview of Recommendations

Update the System to differentiate between Positive and Negative BC NOAs for CalFresh and CalWORKs.

1.4 Assumptions

This SCR will not be adding new NOAs to the CalSAWS system. SCR CA-241335 will add missing BC/Benefit Reduction (BR) NOAs. And SCR CA-266573 will update the trigger for the Shelter Utility Change NOAs to include more scenarios.

Currently the term "Benefit Reduction" (BR) is widely used in conjunction with recoupment transactions for Recovery Accounts.

Example 1: when there is an EDBC with the 'Overpayment Adjustment Amount' greater than 0 which reduces the EDBC Authorized Amount to less than the amount in a previous EDBC for that same benefit month.

Example 2: when EDBC's will result in a negative balance on a recovery account, a benefit reduction redistribution will take place to avoid that. Recoupment scenarios only account for 1 out of 5 scenarios of BR. This SCR will refer to a *Negative BC NOA* as a BC NOA generated by an authorized EDBC that resulted in a reduction of benefits due to the following types of changes:

- Household/AU Size Change,
- Income Change,
- Shelter Change,
- Proration Change, or
- Over Payment Adjustment Change.

This SCR will not affect NOAs mailed out before the SCR's implementation.

2 RECOMMENDATIONS

2.1 Positive vs Negative Benefit Change NOAs

2.1.1 Overview

The CalSAWS System does not differentiate between Positive and Negative BC NOAs.

2.1.2 Description of Change

Update the CalSAWS System to differentiate between Positive and Negative BC NOAs for CalFresh and CalWORKs. Add a flag to indicate whether a BC NOA results in a negative change.

1. Database Change Request (DBCR) to NOA table to add the new BR_IND column.

Note: the GENERATE_DOC.ACTN_CODE value of 'BR' will not be used. It can be found in conversion records and the logic that sets new records to this value is a leftover from C-IV and is unreliable.

2. Populate the new flag for CalFresh and CalWORKs when the amounts for the previous allotment and the current authorized amount are being fetched from the EDBC and used for NOA Action variable population.

If the previous amount is greater than the current amount, set the BR_IND to 'Y', otherwise leave it empty.

Only the Action fragments that contain both amount variables will have a way to calculate this flag by extending their current variable population logic. These Action fragments are: CF_CH_ACTION1, CF_CH_ACTION2, CF_CH_ACTION4, CF_CH_ACTION8, CW_CH_ACTION1, CW_CH_ACTION7, CW_CH_ACTION10. The Action fragments that do not contain these variables will leave it empty.

Tech Notes:

BR_IND will be set to 'Y' if: edbc. getPreviousMonthAllotmentForNoa() > edbc.getAuthorizedAmount().

BR_IND it will be set in:

ActionHelper.createFsActionWithEffectiveChangeDatePriorBenefitAmountNewBenefitAmount() and

ActionHelper.createCwActionWithEffectiveChangeDatePriorMonthCashAidAmountNewCashAidAmount().

2.1.3 Counties Impacted

All Counties

Record of Change

The following changes have been made to this document.

Table 1: Record of Change

DOCUMENT PHASE	DATE CHANGED	CHANGE MADE BY	SUMMARY OF CHANGES MADE
0.1	11/01/2024	Maria Jensen	▪ Initial Draft
0.2	11/24/2024	Maria Jensen	▪ Rehaul
0.3	02/19/2025	Maria Jensen	▪ Build review – flag has 2 total values instead of 3
0.4	04/07/2025	Steven Contreras	▪ Analyst review – formatting



California Statewide Automated Welfare System

Design

CA-232479

Update CF, CW, and RCA EDBC
Reporting Type and Aid Code Options
for Override or Manual EDBC

DOCUMENT APPROVAL HISTORY

Prepared By Sridhar Mullapudi

Reviewed By Norma Meza, Richard Weeks

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/03/2025	1.0	Initial Draft	Sridhar Mullapudi
04/01/2025	1.1	Included 'Non Reporting' to be removed from reporting type drop down and updated the effective date for 'Change Reporting'	Sridhar Mullapudi

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CA-232479 – Update CF, CW, and RCA EDBC Reporting Type and Aid Code Options for Override or Manual EDBC

1 OVERVIEW

1.1 Current Design

CalFresh EDBC automatically determines if a household qualifies for the Work Incentive Nutritional Supplement (WINS). If the household qualifies for WINS, EDBC is determined a WINS aid code and WINS allotment amount is determined for the household. When EDBC is determined the household is not WINS eligible, overriding the EDBC results does not allow the user to override the EDBC to make the household WINS eligible. WINS eligible can only be determined by EDBC automated determination.

When running manual/overriding CalWORKs (CW), RCA, or CalFresh (CF) EDBC results, the following dropdown options are available for reporting type data field:

CW or RCA EDBC:

1. Quarterly Reporting
2. Semi-Annual Reporting
3. Annual Reporting

CF EDBC:

1. Quarterly Reporting
2. Non Reporting
3. Change Reporting
4. Semi-Annual Reporting
5. Semi-Annual Reporting Annually
6. Semi-Annual Reporting - No Report

1.2 Requests

1. Update CF EDBC to allow the user to override the CF aid code to a WINS aid code to provide WINS benefits for the household.
2. ACL 15-90 and ACL-12-25 eliminated 'Change Reporting' and 'Quarterly Reporting' respectively. Update CW and CF EDBC when override/Manual to display accurate 'Reporting Type' drop down options for each program.

1.3 Overview of Recommendations

1. Update EDBC override/manual EDBC options for 'Reporting type' options to not display the following options:

- a. **CF EDBC:** "Quarterly Reporting", "Change Reporting" and "Non Reporting"
 - b. **CW or RCA EDBC:** "Quarterly Reporting"
2. Update the CF EDBC to allow users to override/set to a WINS aid code when running an override/Manual EDBC.
3. Update CF EDBC logic to display the WINS allotment amount on the EDBC summary page when user sets a WINS aid code on online/manual EDBC.

1.4 Assumptions

1. GAGR functionality shall remain unchanged with the implementation of this SCR.

2 RECOMMENDATIONS

2.1 Program Configuration [Override] List page

2.1.1 Overview

When overriding or running a manual CF EDBC, allow the user to set the CF EDBC aid code to a WINS aid code and do not display "Quarterly Reporting" and "Change Reporting" options for 'Reporting Type' drop down options.

When overriding or running a manual CW or RCA EDBC, do not display "Quarterly Reporting" option for 'Reporting Type' drop down options.

2.1.2 Program Configuration [Override] List Page Mockup

User Override

Categorically Eligible:

Meets ESAP Criteria:

Household Category:

SUAS Eligible:

Aid Code:

Program Type:

Program Status:

Program Status Reason:

Reporting Type:

Reporting Type Reason:

▼

▼

▼

▼

▼

▼

▼

▼

▼

▼

Clear

Program Configuration

Note: Overridden rows are in bold.

Name	Role	Status	Status Reason
<div> <div>▼</div> <div>09 - CalFresh</div> <div>0F - TCF</div> <div>R2 - CF - TCVAP (State)</div> <div>R4 - WINS Non-Two-Parent</div> <div>R5 - WINS Two-Parent</div> <div>R6 - WINS CFAP</div> <div>R7 - WINS Non-Two Parent TCF</div> <div>R8 - WINS Two-Parent TCF</div> <div>R9 - WINS TCFAP</div> </div>			

Figure 2.1.1 – CalFresh: Program Configuration [Override] List page – ‘Aid Code’

User Override

Categorically Eligible:

Meets ESAP Criteria:

Household Category:

SUAS Eligible:

Aid Code:

Program Type:

Program Status:

Program Status Reason:

Reporting Type:

Reporting Type Reason:

▼

▼

▼

▼

▼

▼

▼

▼

▼

▼

Clear

Change Reporting

Non Reporting

Quarterly Reporting

Semi-Annual Reporting

Semi-Annual Reporting - No Report

Semi-Annual Reporting Annually

Figure 2.1.2 – CalFresh: Program Configuration [Override] List page – ‘Reporting Type’

User Override

Aid Code:

Aid Code Reason:

Program Status:

Program Status Reason:

Reporting Type:

Reporting Type Reason:

▼

▼

▼

▼

▼

▼

Clear

Annual Reporting

Quarterly Reporting

Semi-Annual Reporting

Figure 2.1.3 – CalWORKs or RCA: Program Configuration [Override] List page – ‘Reporting Type’

2.1.3 Description of Changes

1. Update the CalFresh 'Program Configuration [Override] List' page to include the following WINS aid codes in the 'Aid Code' dropdown list when overriding or running a manual EDBC for the user to choose.
 - a. R4-WINS Non-Two-Parent
 - b. R5-WINS Two-Parent
 - c. R6-WINS CFAP
 - d. R7-WINS Non-Two Parent TCF
 - e. R8-WINS Two-Parent TCF
 - f. R9-WINS TCFAP

These aid codes shall not replace the existing aid code available in the drop down.

2. When EDBC is overridden from a Non-WINS aid code to a WINS aid code or set by the user with a manual EDBC, saving the override results shall display a WINS allotment section below the allotment section:

Work Incentive Nutritional Supplement		
WINS Amount	\$	10.00

Note: The allotment amount shall not be a hyper link when the household is eligible to WINS due to user override or a manual EDBC.

3. Update the CalFresh 'Program Configuration [Override] List' page to remove the following drop-down options from the 'Reporting Type' drop down list as of effective benefit month mentioned below:
 - a. Quarterly Reporting - effective 04/01/2013
 - b. Change Reporting – effective 07/01/2016
 - c. Non Reporting – effective 03/01/2022
4. Update the CalWORKs and RCA 'Program Configuration [Override] List' page to remove the following drop-down option from the 'Reporting Type' drop down list as of effective benefit month mentioned below:
 - a. Quarterly Reporting - effective 04/01/2013

2.1.4 Page Location

- **Global: Customer Information**
- **Local: Run EDBC**
- **Task: Program Configuration [Override] List**

2.1.5 Security Updates

None

2.1.6 Page Mapping

None

2.1.7 Accessibility

None

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Automated Regression Test

2.2.1 Overview

Create new automated regression test scripts to verify the aid codes available during Manual EDBC and EDBC override for the CalFresh program, and the WINS value display when a WINS aid code is selected

2.2.2 Description of Changes

1. Create regression scripts to verify that the following aid codes are available when creating a Manual EDBC for the CalFresh program:
 - a. R4-WINS Non-Two-Parent
 - b. R5-WINS Two-Parent
 - c. R6-WINS CFAP
 - d. R7-WINS Non-Two Parent TCF
 - e. R8-WINS Two-Parent TCF
 - f. R9-WINS TCFAP

2. Create regression scripts to verify that the WINS Amount displays, with no hyperlink, when a Manual EDBC is created for the CalFresh program with a WINS aid code selected.

Technical Note: This scenario should be verified for at least one WINS aid code. Verifying every applicable aid code is not in scope.

3. Create regression scripts to verify that the following aid codes are available when overriding regular EDBC results for the CalFresh program:
 - a. R4-WINS Non-Two-Parent
 - b. R5-WINS Two-Parent
 - c. R6-WINS CFAP
 - d. R7-WINS Non-Two Parent TCF
 - e. R8-WINS Two-Parent TCF
 - f. R9-WINS TCFAP

4. Create regression scripts to verify that the WINS Amount displays, with no hyperlink, when a regular EDBC for the CalFresh program is overridden with a WINS aid code selected.

Technical Note: This scenario should be verified for at least one WINS aid code. Verifying every applicable aid code is not in scope.

3 SUPPORTING DOCUMENTS

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

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT

Design

CA-251204

Add NOA Fragments in Threshold Languages for
Medi-Cal NOA Generation (MC 239 MSP-D)

DOCUMENT APPROVAL HISTORY

Prepared By	Rakesh Nalluru
Reviewed By	Nagesha S

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/17/2025	1.0	Initial Draft	Rakesh Nalluru

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CA-251204 - Add NOA Fragments in Threshold Languages for Medi-Cal NOA Generation (MC 239 MSP-D)

1 OVERVIEW

The purpose of this change is to Add Threshold languages for MC 239 MSP-D NOA.

1.1 Current Design

Currently MC 239 MSP-D NOA is available in English, Spanish and few Threshold Languages in CalSAWS.

1.2 Requests

1. Add new threshold languages for MSP Determination - Failure for Verification with reason code Q410D.
2. Add new threshold languages for MSP Determination - Retro Failure for Verification with a reason code Q411D.
3. Add threshold Languages for the Failure for Excess Income with reason code Q402D.
4. Add threshold Languages for the Failure for Unverified Resource with reason code Q302D.
5. Add threshold Languages for the Failure for Unverified Resource with reason code Q116D.
6. Add threshold Languages for the Failure for not signing SOF with reason code Q128D.

1.3 Overview of Recommendations

1. Add new threshold languages for MSP Determination - Failure for Verification with reason code Q410D.
2. Add new threshold languages for MSP Determination - Retro Failure for Verification with a reason code Q411D.
3. Add threshold Languages for the Failure for Excess Income with reason code Q402D.
4. Add threshold Languages for the Failure for Unverified Resource with reason code Q302D.
5. Add threshold Languages for the Failure for Unverified Resource with reason code Q116D.
6. Add threshold Languages for the Failure for not signing SOF with reason code Q128D.

1.4 Assumptions

1. The triggering conditions of the NOA Fragments for Threshold Generation remains the same as English and are not being updated.
2. The NOA template remains the same and is not being updated.
3. The existing variable population is not being updated with this effort

2 RECOMMENDATIONS

2.1 Add threshold Languages for the MSP Determination - Failure for Verification with reason code Q410D

2.1.1 Overview

Add new threshold languages for MSP Determination - Failure for Verification NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: Q_DN_FAIL_DETER_VERIF_Q410 (Fragment ID: 6385)

State Form/NOA: MC 239 MSP-D

Current NOA Template: Q_NOA_TEMPLATE (ID: 3158)

Current Program(s): Medi-Cal

Current Action Type: Denial

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English

2.1.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA reason.

Add Threshold languages: Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

NOA Mockups/Examples: Supporting Documents #1

2.1.3 Form/NOA Variable Population

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

2.1.4 Form/NOA Generation Conditions

No updates to this section.

2.2 Add threshold Languages for the MSP Determination - Retro Failure for Verification with a reason code Q411D

2.2.1 Overview

Add new threshold languages for MSP Determination - Retro Failure for Verification NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: Q_DN_RETRO_FAIL_DETER_VERIF_Q411
(Fragment ID: 6386)

State Form/NOA: MC 239 MSP-D

Current NOA Template: Q_NOA_TEMPLATE (ID: 3158)

Current Program(s): Medi-Cal

Current Action Type: Denial

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English

2.2.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA reason.

Add Threshold languages: Spanish, Armenian, Arabic, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

NOA Mockups/Examples: Supporting Documents #1

2.2.3 Form/NOA Variable Population

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

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.3 Add threshold Languages for the Failure for Excess Income with reason code Q402D

2.3.1 Overview

Add threshold languages for Failure for Excess Income NOA reason Fragments in CalSAWS.

Reason Fragment Name and ID: Q_DN_EXCESS_INCOME_Q402 (Fragment ID: 7437)

State Form/NOA: MC 239 MSP-D

Current NOA Template: Q_NOA_TEMPLATE (ID: 3158)

Current Program(s): Medi-Cal

Current Action Type: Denial

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese.

2.3.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA reason.

Add Threshold languages: Arabic, Farsi, Hmong and Lao.

NOA Mockups/Examples: Supporting Documents #1

2.3.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English and Spanish Languages for population logic.

2.3.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.4 Add threshold Languages for the Failure for Unverified Resource with reason code Q302D

2.4.1 Overview

Add threshold languages for Failure for Unverified Resource NOA reason Fragments in CalSAWS.

Title Fragment Name and ID: Q_DN_RESOURCES_UNVERIF_Q302 (Fragment ID: 7436)

State Form/NOA: MC 239 MSP-D

Current NOA Template: Q_NOA_TEMPLATE (ID: 3158)

Current Program(s): Medi-Cal

Current Action Type: Denial

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese.

2.4.2 Form/NOA Verbiage

Create threshold fragment xdfs for NOA Title.

Add Threshold languages: Arabic, Farsi, Hmong and Lao

NOA Mockups/Examples: Supporting Documents #1

2.4.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English, Spanish and Threshold Languages for population logic.

2.4.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.5 Add threshold Languages for the Overlapping aid exists with reason code Q116D

2.5.1 Overview

Add threshold languages for Overlapping aid exists NOA reason Fragments in CalSAWS.

Title Fragment Name and ID: Q_DN_OVERLAP_AID_Q116 (Fragment ID: 7433)

State Form/NOA: MC 239 MSP-D

Current NOA Template: Q_NOA_TEMPLATE (ID: 3158)

Current Program(s): Medi-Cal

Current Action Type: Denial

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English and Spanish

2.5.2 Form/NOA Verbiage

Create threshold fragment xdps for NOA Title.

Add Threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog and Vietnamese.

NOA Mockups/Examples: Supporting Documents #1

2.5.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English, Spanish and Threshold Languages for population logic.

2.5.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

2.6 Add threshold Languages for the Failure for not signing SOF with reason code Q128D

2.6.1 Overview

Add threshold languages for Failure for not signing SOF NOA reason Fragments in CalSAWS.

Title Fragment Name and ID: Q_DN_SOF_NOT_SIGNED_Q128 (Fragment ID: 7435)

State Form/NOA: MC 239 MSP-D

Current NOA Template: Q_NOA_TEMPLATE (ID: 3158)

Current Program(s): Medi-Cal

Current Action Type: Denial

Currently Repeatable: No

Include NA Back 9: Yes

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

Existing Languages: English, Spanish, Armenian, Cambodian, Chinese, Korean, Russian, Tagalog and Vietnamese

2.6.2 Form/NOA Verbiage

Create threshold fragment xdfs for NOA Title.

Add Threshold languages: Arabic, Farsi, Hmong and Lao

NOA Mockups/Examples: Supporting Documents #1

2.6.3 Form/NOA Variable Population

Field Mappings: Use the same field mappings as the English, Spanish and Threshold Languages for population logic.

2.6.4 Form/NOA Generation Conditions

No updates to existing trigger conditions

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1.	Correspondence	MSP Determination - Failure for Verification	Mockups_Fragment_Verbiage.zip
2.	Correspondence	MSP Determination - Retro Failure for Verification	Mockups_Fragment_Verbiage.zip
3.	Correspondence	Failure for Excess Income	Mockups_Fragment_Verbiage.zip
4.	Correspondence	Failure for Unverified Resource	Mockups_Fragment_Verbiage.zip
5.	Correspondence	Overlapping aid exists	Mockups_Fragment_Verbiage.zip
6.	Correspondence	Failure for not signing SOF	Mockups_Fragment_Verbiage.zip

Design

CA-262223

Update CF 377.11 and add Threshold Languages

DOCUMENT APPROVAL HISTORY

Prepared By	Mohammad Dabbagh
Reviewed By	Tiffany Huckaby

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/06/2025	1.0	Initial Revision	Mohammad Dabbagh

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CA-262223 – Update CF 377.11 and add Threshold Languages

1 OVERVIEW

This system change request (SCR) outlines the update the 377.11 NOA fragments to use latest State version (11/23), including the most updated versions of the threshold Languages.

1.1 Current Design

Currently the CF 377.11 that generates from EDBC has a version for Benefit Change and Discontinuances uses out of date verbiage.

1.2 Requests

1. Update the NOA fragment verbiage of CF 377.11 to use the latest State version (11/23) and update the threshold languages verbiage.

Note: CF 377.1A NOA will be updated with ABAWD Denial verbiage with CA-265360.

1.3 Overview of Recommendations

1. Add the latest version of the threshold languages verbiage for the Action and Reason fragments for 377.11 NOAs.
2. Update the Message fragment verbiage to the latest version for English and all threshold languages.

1.4 Assumptions

1. SCR CA-206913 will be updating the version of CF 377.11 in the template repository to the latest State version (11/23) in all threshold languages.
2. There are no other changes to these fragments unless otherwise specified in the Recommendations.

2 RECOMMENDATIONS

2.1 Update CF 377.11 NOA Action Change Fragment to use the latest version of verbiage from the State (11/23)

2.1.1 Overview

This effort is to update the NOAs related to CF 377.11 to use the latest version of the State form (11/23).

Fragment Name and ID: CF_CH_ACTION8 (Fragment ID: 4125)

State Form/NOA: Taken from State Form CF 377.11 (6/18) - CalFresh Time Limit Notice - Failure To Meet The Able-Bodied Adults Without Dependents (ABAWDs) Work Requirement

Program(s): CalFresh

Action Type: Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.1.2 Form/NOA Verbiage

There will not be any updates to the verbiage of this fragment.

2.1.3 Form/NOA Variable Population

Update NOA Footer Reference for CalFresh Reason

The following are the references that will be included for the Change of ABAWDs Benefits Reason Fragment when generated for CalFresh.

NOA Reference on Document List Page: N/A

NOA Title: N/A

NOA Footer: CF 377.11 (11/23) REQUIRED FORM - NO SUBSTITUTES PERMITTED
NOA Footer Requires Translations: No

2.1.4 Form/NOA Generation Conditions

There will not be any updates to the generation condition of this fragment.

2.2 Update CF 377.11 NOA Reason Change Fragment to use the latest version of verbiage from the State (11/23)

2.2.1 Overview

This effort is to update the NOAs related to CF 377.11 to use the latest version of the State form (11/23).

Fragment Name and ID: CF_CH_ABAWD_NO_MEETING_WORK_RULE_F716
(Fragment ID: 7611)

State Form/NOA: Taken from State Form CF 377.11 (6/18) - CalFresh Time Limit Notice - Failure To Meet The Able-Bodied Adults Without Dependents (ABAWDs) Work Requirement

Program(s): CalFresh

Action Type: Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.2.2 Form/NOA Verbiage

There will not be any updates to the verbiage of this fragment.

2.2.3 Form/NOA Variable Population

Update NOA Footer Reference for CalFresh Reason

The following are the references that will be included for the Change of ABAWDs Benefits Reason Fragment when generated for CalFresh.

NOA Reference on Document List Page: N/A

NOA Title: N/A

NOA Footer: CF 377.11 (11/23) REQUIRED FORM - NO SUBSTITUTES PERMITTED
NOA Footer Requires Translations: No

2.2.4 Form/NOA Generation Conditions

There will not be any updates to the generation condition of this fragment.

2.3 Update CF 377.11 NOAs Message Change Fragment to use the latest version of verbiage from the State (11/23)

2.3.1 Overview

This effort is to update the message fragment related to CF 377.11 NOAs to use the latest version of the State form (11/23).

Fragment Name and ID: CF_CH_MESSAGE8 (Fragment ID: 5102)

State Form/NOA: Taken from State Form CF 377.11 (6/18) - CalFresh Time Limit Notice - Failure To Meet The Able-Bodied Adults Without Dependents (ABAWDs) Work Requirement

Program(s): CalFresh

Action Type: Change

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.3.2 Form/NOA Verbiage

Update CalFresh Message Fragment XDP

Update the verbiage of CalFresh Message Fragment.

Update Fragment XDP

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

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	<p>You will be required to work, be excused from the work requirement or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period.</p> <p><u>HOW TO KEEP GETTING CALFRESH</u></p> <p>You can continue getting CalFresh if you:</p> <ul style="list-style-type: none"> • Meet the work requirement by showing proof that for at least 20 hours per week on average or 80 hours per month, you are: • Working, including self-employment; • Going to school or training; 	<p>You will be required to work, be excused from the work requirement, or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period.</p> <p><u>HOW TO KEEP GETTING CALFRESH</u></p> <p>You can continue getting CalFresh if you:</p> <ul style="list-style-type: none"> • Meet the work requirement by showing proof that, for at least 20 hours per week on average or 80 hours per month, you are: • Working, including self-employment; 	Arial, Size 10

	<ul style="list-style-type: none"> • Doing volunteer work, community service or in-kind work (working in exchange for goods or services instead of money); • Participating in Employment & Training (E&T); • Participating in job search up to 9 hours per week in combination with other work activities; or • Doing a combination of any of the above. • Go to workfare for the number of hours determined by the county, if available. • Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available. • Meet one of the following excuses from the work requirement: <ul style="list-style-type: none"> • Under age 18 or over age 49; • Physically or mentally unable to work 20 hours per week for a total of 80 hours per month; • Applying for or getting disability benefits (including veterans disability benefits); • Applying for or getting unemployment insurance benefits (UIB); • Chronically homeless; • Struggling with drugs or alcohol; • A victim of domestic violence; • Going to school at least half-time (additional student eligibility rules may apply); • Pregnant; • Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling or the child of another person living in the home who is part of the CalFresh household); 	<ul style="list-style-type: none"> • Going to school or training; • Doing volunteer work, community service, or in-kind work (working in exchange for goods or services instead of money); • Participating in Employment & Training (E&T); • Participating in job search up to 9 hours per week in combination with other work activities; or • Doing a combination of any of the above. • Go to workfare for the number of hours determined by the county, if available. • Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available. • Meet one of the following excuses from the work requirement: <ul style="list-style-type: none"> • Under age 18 or over age _____; • Physically or mentally unable to work 20 hours per week for a total of 80 hours per month; • Applying for or getting disability benefits (including veterans disability benefits); • Applying for or getting unemployment insurance benefits (UIB); • Struggling with drugs or alcohol; • A victim of domestic violence; • Going to school at least half-time (additional student eligibility rules may apply); • Pregnant; • Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling, or the child of another person living in the home who is part of the CalFresh household); 	
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	<ul style="list-style-type: none"> • Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); or • Meeting or excused from the CalWORKs Welfare-to-Work rules. <p>If you think you met the work requirement, may be excused from the work requirement or have a good reason for not meeting the work requirement, contact your county as soon as possible.</p> <p><u>IF YOU LOSE CALFRESH, YOU MAY REAPPLY</u></p> <ul style="list-style-type: none"> • If you meet the work requirement during a period of 30 days in a row. • At any time if you become excused from the work requirement. • If you move to an area where the time limit is waived. • On or after January 1, 2020 when the 36-month period restarts. <p><u>36-MONTH PERIOD</u> During a 36-month period you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation.</p> <p><u>MANDATORY REPORTS</u> You are required to contact the county when you have either:</p> <ul style="list-style-type: none"> • Received gross monthly income over the Income Reporting Threshold (IRT); or • A reduction in ABAWD work hours below 20 hours 	<ul style="list-style-type: none"> • Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); • Meeting or excused from the CalWORKs Welfare-to-Work rules; • Experiencing homelessness; • A veteran who served in the armed forces of the United States (this includes veterans who were honorably or dishonorably discharged); or • Under age 25 and in Foster Care on 18th birthday. <p>If you think you met the work requirement, may be excused from the work requirement, or have a good reason for not meeting the work requirement, contact your county as soon as possible.</p> <p><u>IF YOU LOSE CALFRESH, YOU MAY REAPPLY</u></p> <ul style="list-style-type: none"> • If you meet the work requirement during a period of 30 days in a row. • At any time if you become excused from the work requirement. • If you move to an area where the time limit is waived. • On or after January 1, 2023, when the 36-month period restarts. <p><u>36-MONTH PERIOD</u> During a 36-month period, you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the</p>	
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	per week for a total of 80 hours per month.	<p>work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation.</p> <p>MANDATORY REPORTS You are required to contact the county when you have:</p> <ul style="list-style-type: none"> • Received gross monthly income over the Income Reporting Threshold (IRT); • A reduction in ABAWD work hours below 20 hours per week for a total of 80 hours per month; or • Won at least \$_____ in a lottery or by gambling. 	
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*English only, Spanish and threshold will generate based on project standards for that language.

2.3.3 Form/NOA Variable Population

Add New CalFresh Action Fragment Variable Population

Variable Name	Population	Formatting*
over_age	The age used as the minimum upper age to receive benefits	Arial, Size 10
winnings_amount	The minimum amount of money won as part lottery or gambling	Arial, Size 10

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

Variables Requiring Translations: N/A

Update NOA Footer Reference for CalFresh Reason

The following are the references that will be included for the Change of ABAWDs Benefits Reason Fragment when generated for CalFresh.

NOA Reference on Document List Page: N/A

NOA Title: N/A

NOA Footer: CF 377.11 (11/23) REQUIRED FORM - NO SUBSTITUTES PERMITTED

NOA Footer Requires Translations: No

2.3.4 Form/NOA Generation Conditions

There will not be any updates to the generation condition of this fragment.

2.4 Update CF 377.11 NOA Action Discontinuance Fragment to use the latest version of verbiage from the State (11/23)

2.4.1 Overview

This effort is to update the NOAs related to CF 377.11 to use the latest version of the State form (11/23).

Fragment Name and ID: CF_TN_ACTION8 (Fragment ID: 4126)

State Form/NOA: Taken from State Form CF 377.11 (6/18) - CalFresh Time Limit Notice - Failure To Meet The Able-Bodied Adults Without Dependents (ABAWDs) Work Requirement

Program(s): CalFresh

Action Type: Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.4.2 Form/NOA Verbiage

There will not be any updates to the verbiage of this fragment.

2.4.3 Form/NOA Variable Population

Update NOA Footer Reference for CalFresh Reason

The following are the references that will be included for the Discontinuance of ABAWDs Benefits Reason Fragment when generated for CalFresh.

NOA Reference on Document List Page: N/A

NOA Title: N/A

NOA Footer: CF 377.11 (11/23) REQUIRED FORM - NO SUBSTITUTES PERMITTED

NOA Footer Requires Translations: No

2.4.4 Form/NOA Generation Conditions

There will not be any updates to the generation condition of this fragment.

2.5 Update CF 377.11 NOA Reason Discontinuance Fragment to use the latest version of verbiage from the State (11/23)

2.5.1 Overview

This effort is to update the NOAs related to CF 377.11 to use the latest version of the State form (11/23).

Fragment Name and ID:

CF_TN_ABAWD_NO_WORK_RULE_AND_3CONS_MOTHNS_F716 (Fragment ID: 7613)

State Form/NOA: Taken from State Form CF 377.11 (6/18) - CalFresh Time Limit Notice - Failure To Meet The Able-Bodied Adults Without Dependents (ABAWDs) Work Requirement

Program(s): CalFresh

Action Type: Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.5.2 Form/NOA Verbiage

There will not be any updates to the verbiage of this fragment.

2.5.3 Form/NOA Variable Population

Update NOA Footer Reference for CalFresh Reason

The following are the references that will be included for the Discontinuance of ABAWDs Benefits Reason Fragment when generated for CalFresh.

NOA Reference on Document List Page: N/A

NOA Title: N/A

NOA Footer: CF 377.11 (11/23) REQUIRED FORM - NO SUBSTITUTES PERMITTED
NOA Footer Requires Translations: No

2.5.4 Form/NOA Generation Conditions

There will not be any updates to the generation condition of this fragment.

2.6 Update CF 377.11 NOAs Message Discontinuance Fragment to use the latest version of verbiage from the State (11/23)

2.6.1 Overview

This effort is to update the message fragment related to CF 377.11 NOAs to use the latest version of the State form (11/23).

Fragment Name and ID: CF_TN_MESSAGE8 (Fragment ID: 5103)

State Form/NOA: Taken from State Form CF 377.11 (6/18) - CalFresh Time Limit Notice - Failure To Meet The Able-Bodied Adults Without Dependents (ABAWDs) Work Requirement

Program(s): CalFresh

Action Type: Discontinuance

Fragment Level: Program

Repeatable: No

Include NA Back 9: Yes

Current Forms/NOAs Generated with this NOA: NA Back 9

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

2.6.2 Form/NOA Verbiage

Update CalFresh Message Fragment XDP

Update the verbiage of CalFresh Message Fragment.

Update Fragment XDP

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

NOA Mockups/Examples: See Supporting Documents #2

Description	Existing Text	Updated Text	Formatting*
Static	<p>You will be required to work, be excused from the work requirement or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period.</p> <p><u>HOW TO KEEP GETTING CALFRESH</u></p> <p>You can continue getting CalFresh if you:</p> <ul style="list-style-type: none"> • Meet the work requirement by showing proof that for at least 20 hours per week on average or 80 hours per month, you are: • Working, including self-employment; • Going to school or training; 	<p>You will be required to work, be excused from the work requirement, or have a good reason for not meeting the work requirement in order to get CalFresh for more than three months within the 36-month period.</p> <p><u>HOW TO KEEP GETTING CALFRESH</u></p> <p>You can continue getting CalFresh if you:</p> <ul style="list-style-type: none"> • Meet the work requirement by showing proof that, for at least 20 hours per week on average or 80 hours per month, you are: • Working, including self-employment; 	Arial, Size 10

	<ul style="list-style-type: none"> • Doing volunteer work, community service or in-kind work (working in exchange for goods or services instead of money); • Participating in Employment & Training (E&T); • Participating in job search up to 9 hours per week in combination with other work activities; or • Doing a combination of any of the above. • Go to workfare for the number of hours determined by the county, if available. • Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available. • Meet one of the following excuses from the work requirement: <ul style="list-style-type: none"> • Under age 18 or over age 49; • Physically or mentally unable to work 20 hours per week for a total of 80 hours per month; • Applying for or getting disability benefits (including veterans disability benefits); • Applying for or getting unemployment insurance benefits (UIB); • Chronically homeless; • Struggling with drugs or alcohol; • A victim of domestic violence; • Going to school at least half-time (additional student eligibility rules may apply); • Pregnant; • Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling or the child of another person living in the home who is part of the CalFresh household); 	<ul style="list-style-type: none"> • Going to school or training; • Doing volunteer work, community service, or in-kind work (working in exchange for goods or services instead of money); • Participating in Employment & Training (E&T); • Participating in job search up to 9 hours per week in combination with other work activities; or • Doing a combination of any of the above. • Go to workfare for the number of hours determined by the county, if available. • Have a good reason, such as you were ill, were caring for a sick or injured person, had an emergency, or had no transportation available. • Meet one of the following excuses from the work requirement: <ul style="list-style-type: none"> • Under age 18 or over age _____; • Physically or mentally unable to work 20 hours per week for a total of 80 hours per month; • Applying for or getting disability benefits (including veterans disability benefits); • Applying for or getting unemployment insurance benefits (UIB); • Struggling with drugs or alcohol; • A victim of domestic violence; • Going to school at least half-time (additional student eligibility rules may apply); • Pregnant; • Living with a child under age 18 who is part of your CalFresh household, even if they are not eligible for CalFresh (this can be your own child, sibling, or the child of another person living in the home who is part of the CalFresh household); 	
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	<ul style="list-style-type: none"> • Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); or • Meeting or excused from the CalWORKs Welfare-to-Work rules. <p>If you think you met the work requirement, may be excused from the work requirement or have a good reason for not meeting the work requirement, contact your county as soon as possible.</p> <p><u>IF YOU LOSE CALFRESH, YOU MAY REAPPLY</u></p> <ul style="list-style-type: none"> • If you meet the work requirement during a period of 30 days in a row. • At any time if you become excused from the work requirement. • If you move to an area where the time limit is waived. • On or after January 1, 2020 when the 36-month period restarts. <p><u>36-MONTH PERIOD</u> During a 36-month period you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation.</p> <p><u>MANDATORY REPORTS</u> You are required to contact the county when you have either:</p> <ul style="list-style-type: none"> • Received gross monthly income over the Income Reporting Threshold (IRT); or • A reduction in ABAWD work hours below 20 hours 	<ul style="list-style-type: none"> • Caring for a dependent child under age 6 or a sick or injured person who will need your help for more than 30 days (the child or sick or injured person does not have to be a CalFresh member or living in the home); • Meeting or excused from the CalWORKs Welfare-to-Work rules; • Experiencing homelessness; • A veteran who served in the armed forces of the United States (this includes veterans who were honorably or dishonorably discharged); or • Under age 25 and in Foster Care on 18th birthday. <p>If you think you met the work requirement, may be excused from the work requirement, or have a good reason for not meeting the work requirement, contact your county as soon as possible.</p> <p><u>IF YOU LOSE CALFRESH, YOU MAY REAPPLY</u></p> <ul style="list-style-type: none"> • If you meet the work requirement during a period of 30 days in a row. • At any time if you become excused from the work requirement. • If you move to an area where the time limit is waived. • On or after January 1, 2023, when the 36-month period restarts. <p><u>36-MONTH PERIOD</u> During a 36-month period, you can only get CalFresh for three months unless you meet the ABAWD work requirement or are excused from the</p>	
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	per week for a total of 80 hours per month.	<p>work requirement. If you start meeting the work requirement and need to stop, you can get CalFresh for another three months without meeting the work requirement if you meet certain conditions. Call the county at that time and explain your situation.</p> <p>MANDATORY REPORTS You are required to contact the county when you have:</p> <ul style="list-style-type: none"> • Received gross monthly income over the Income Reporting Threshold (IRT); • A reduction in ABAWD work hours below 20 hours per week for a total of 80 hours per month; or • Won at least \$_____ in a lottery or by gambling. 	
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*English only, Spanish and threshold will generate based on project standards for that language.

2.6.3 Form/NOA Variable Population

Add New CalFresh Action Fragment Variable Population

Variable Name	Population	Formatting*
over_age	The age used as the minimum upper age to receive benefits	Arial, Size 10
winnings_amount	The minimum amount of money won as part lottery or gambling	Arial, Size 10

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

Variables Requiring Translations: N/A

Update NOA Footer Reference for CalFresh Reason

The following are the references that will be included for the Discontinuance of ABAWDs Benefits Reason Fragment when generated for CalFresh.

NOA Reference on Document List Page: N/A

NOA Title: N/A

NOA Footer: CF 377.11 (11/23) REQUIRED FORM - NO SUBSTITUTES PERMITTED

NOA Footer Requires Translations: No

2.6.4 Form/NOA Generation Conditions

There will not be any updates to the generation condition of this fragment.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
#1	NOA	Update CalFresh Change Message Fragment for ABAWD rules and requirements	CalFresh_ABAWD_Change_Message_Mockup.pdf
#2	NOA	Update CalFresh Discontinuance Message Fragment for ABAWD rules and requirements	CalFresh_ABAWD_Discontinuance_Message_Mockup.pdf

Design

CA-270512

Update the DHCS CMS Unwinding Eligibility and Enrollment Data Report

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Esequiel Herrera-Ortiz, TK Bui	
	Reviewed By	Laura Alba, Maggie Orozco-Vega, Gokul Suresh, Ravneet Bhatia, Thao Ta, Jeric Derama, Claudia Pinto, Denise Barajas	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/22/2024	1.0	Initial Revision	Esequiel Herrera-Ortiz, TK Bui
02/27/2025	1.1	<ul style="list-style-type: none"> Added "Unwinding" for the PHE date. Removed "Eligibility" from code 16 and RD (CT-73). Added clarifications and examples for Measure 7 base population on event types. Added Appendix Item 4.5 for additional references on existing event types in the system. 	TK Bui
03/04/2025	1.2	<ul style="list-style-type: none"> Removed Appendix Item 4.4 on packet types and updated packet type list in column description for Measure 5 and 7 sheet. Appendix Item on event types is now Appendix Item 4.4. 	TK Bui
03/05/2025	1.3	<ul style="list-style-type: none"> Added Office Name and Unit Name columns for all sheets. Added Worker ID column for Measure 5 and 7 sheet. 	TK Bui
3/26/2025	1.4	<ul style="list-style-type: none"> Clarified that the points related to Measure 5 and Measure 1, 2, 3 are part of changes from SIRFRA 1186. 	TK Bui

		<ul style="list-style-type: none"> Clarified on existing logic vs. new logic. Added appendix item for additional technical logic on stable income. Clarified example for rescission events in relation to Measure 7. 	
4/3/2025	1.5	<ul style="list-style-type: none"> Fixed initial disposition event column logic for M123. Added point I for M123 and tech note for OTHER_PGM_ASSIST logic. Moved "EDBC that is Regular" logic point to its own point in M4 and M5 and M7. 	TK Bui
4/8/2025	1.6	<ul style="list-style-type: none"> Added additional technical notes for "EDBC that is Regular" logic. Added clarifications/tech notes on M5 and M7 logic on program person application. Added tech notes on renewals signaling change in circumstance for M5. Fixed tech note for Description of Change M123 (f). 	TK Bui
4/10/2025	1.7	<ul style="list-style-type: none"> Removed requirements and changes related to Measures 1,2,3. Updated (d) for Measure 4 logic. 	TK Bui
4/16/2025	1.8	<ul style="list-style-type: none"> Fixed DOB and CIN order in M4 and centered "RENEWALS AND OUTCOMES" in M5 & 7 Mockups. 	TK Bui

- Added asterisk for M7 point b.
- Correct tech note for M7 point c.
- Added clarifying wording in the notes for the M4 and M57 base populations that these are NEW base populations.
- Updated M7 point hv3 to point to correct Appendix Item.
- Removed from M7 the incorrect point j iii.

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CA-270512 – Update the DHCS CMS Unwinding Eligibility and Enrollment Data Report

1 OVERVIEW

With CA-245221, the DHCS CMS Unwinding Eligibility and Enrollment Monthly Report was automated in the system, including a state version which contains summary counts for all counties and is submitted directly to DHCS, as well as a county version which contains case level detailed information. Currently, CalSAWS is providing an ad-hoc version of the DHCS CMS Unwinding Eligibility and Enrollment Data Monthly Report to DHCS through SIRFRA 1186 because the requirements for the report have changed and the report has not been updated. All sheets also do not currently have columns for the Office Name, Unit Name, and Worker ID. All applications from the Monthly Measures 1,2,3 sheet have also been processed as of the report month of March 2025.

This SCR will update the DHCS CMS Unwinding Eligibility and Enrollment Data Monthly Report to align with the logic with SIRFRA 1186, as well as including changes to account for the stable income population for Measure 5 and to exclude applications from Measures 1, 2, 3 where the application source is Craig v Bonta or Breast and Cervical Cancer Treatment Program (BCCTP). Additionally, the templates for all sheets will be updated to include columns for the Office Name, Unit Name, and Worker ID. The Monthly Report Measures 1,2,3 sheet will also be removed from the report starting for the report month of April 2025, as confirmed by DHCS since all applications have been processed from Measure 1 and there are no longer any pending applications left in Measure 3.

1.1 Current Design

The requirements for the DHCS CMS Unwinding Eligibility and Enrollment Data Monthly Report have changed, but the report has not yet been updated for these requirements. Currently, CalSAWS instead provides an ad-hoc version of the report to DHCS through SIRFRA 1186.

1.2 Requests

Update DHCS CMS Unwinding Eligibility and Enrollment Data Monthly Report to align with all the new requirements that have been incorporated into SIRFRA 1186, which includes accounting for the stable income population for Measure 5 and excluding applications from Measures 1, 2, 3 which are sourced from Craig v Bonta or BCCTP. Update the report template to add columns for the Office Name, Unit Name, and Worker ID across all sheets. Remove the Monthly Measures 1,2,3 sheet.

1.3 Overview of Recommendations

1. Update the DHCS CMS Unwinding Eligibility and Enrollment Data Monthly Report to include all the new requirements that have been incorporated into SIRFRA 1186.
 - a. Account for the stable income population for Measure 5.
 - b. Exclude applications from Measures 1, 2, 3 where the application source is Craig v Bonta or BCCTP.
2. Update the report template to add columns for the Office Name, Unit Name, and Worker ID in all sheets.
3. Remove the Monthly Measures 1,2,3 sheet from the report.

1.4 Assumptions

1. The total application count in Measures 1, 2, 3 is a static count. Some applications will go from Pending to Approved/Denied across report months, but the overall count across report months remains static.

Figure 2.1.2.2 – DHCS CMS Unwinding Eligibility and Enrollment Data Detail Mockup (Monthly Report Measures 5 and 7 Sheet)

2.1.3 Description of Change

- Update the base populations for Measures 1, 2, 3 as follows:

Additionally, new logic criteria will be denoted by an asterisk (*).

- Additionally, other Craig v Bonta applications which should be excluded falls under the following:

- 4

1. The record is created before January 1, 2024.
Technical Note: OTHER_PGM_ASSIST.CREATED_ON < 01-01-2024
 2. The associated aid code is 1E – CCE for the Aged (CT-184: **1E**), 2E – CCE for the Blind (CT-184: **2E**), or 6E – CCE for the Disabled (CT-184: **6E**).
Technical Note: OTHER_PGM_ASSIST.AID_CODE in ('1E', '2E', '6E')
 3. The last day of the report month is between the begin and end dates of the record.
Technical Note: Last day of RPT_MONTH is between OTHER_PGM_ASSIST.BEG_DATE and OTHER_PGM_ASSIST.END_DATE.
- ii. The program person does NOT have has a record in the MEDS Alert table where:
 1. The record is created before January 1, 2024.
Technical Note: MEDS_ALERT.CREATED_ON < 01-01-2024
 2. The MEDS Alert number is 9547, 9548, 9582, or 9583.
Technical Note: MEDS_ALERT.MSG.ALERT_NUM_IDENTIF in ('9547', '9548', '9582', '9583')
 3. The associated aid code of 1E – CCE for the Aged (CT-184: **1E**), 2E – CCE for the Blind (CT-184: **2E**), or 6E – CCE for the Disabled (CT-184: **6E**).
Technical Note: MEDS_ALERT.AID_CODE in ('1E', '2E', '6E')
- d. *The program application source is **NOT** BCCTP (CT-294: **BC**).
 - i. **Note:** The record is created before January 1, 2024.
 - ii. **Technical Note:** Exclude apps where PGM_APP.SRC_CODE = **BC** and PGM_APP.CREATED_ON < 01-01-2024
 - e. *The program application is NOT a carried forward application. This only applies for records created before January 1, 2024.
Technical Note: Exclude apps where CH_TRANSACT_INFO.CRRY_FWD_IND = 'Y' and CH_TRANSACT_INFO.CREATED_ON < 01-01-2024
 - f. *The program application is NOT an ICT application. This only applies for records created before January 1, 2024.
Technical Note: Exclude apps where EVENT.TYPE_CODE = **CH** – Changed (CT-157), AND EVENT.TYPE_RSN_CODE = **IC** – ICT (CT-2619), AND PGM_APP.CREATED_ON < 01-01-2024 EVENT.EVENT_DATE < 01-01-2024.
 - i. *The current logic uses CT-350 for EVENT.TYPE_RSN_CODE. Update the logic to use CT-2619 as specified above instead.
 - g. *The person application is NOT an autotest application.
Note: This point does NOT have any logic specified on the Person Application Created On date.
Technical Note: PERS_APP.AUTOTEST_IND is NULL or NOT 'Y'
 - h. *Exclude apps where the requested Medi-Cal type for the person application is created after before January 1, 2024, and NOT one of the following CWS Medi-Cal types (CT-319):

- i. **AE** – AAP EFC (07)
- ii. **AF** – AAP Federal (03)
- iii. **AS** – AAP State (04)
- iv. **CW** – Child Welfare Services Medi-Cal
- v. **FU** – FC County (45)
- vi. **IC** – ICPC (46)
- vii. **IM** – ICAMA (06)
- viii. **KF** – KG Federal (4T)
- ix. **OS** – Out of State AAP (4A)
- x. **Technical Note:** Exclude apps where
`REQ_MC_TYPE.REQ_MC_TYPE_CODE` in ('AE', 'AF', 'AS', 'CW', 'FU',
'IC', 'IM', 'KF', 'OS'), and `REQ_MC_TYPE.CREATED_ON` < 01-01-
2024
- i. The initial pending date occurred on or after March 1, 2020 and before the Public Health Emergency (PHE) Unwinding date. The initial pending date also occurred before the initial disposition.
 - i. **Note:** The application should still have been pending on or after March 1, 2020 and before April 1, 2023. The application should NOT be approved/denied within this range.
- j. The initial disposition date occurred during the unwinding period.
 - i. **Note:** The unwinding period means that the disposition occurs on or after April 1, 2023.
- k. Disability related applications have one of the medical condition types as listed in Appendix Item 4.1.
- l. *When looking at the person status, use the currently effective Program Person record.
 - i. **Technical Note:** `PGM_PERS_DETL.END_DATE` = 12/31/9999 (high date)

2. **Measure 1, 2, 3 Columns:**

Note: This includes the addition of Office Name, Unit Name, and Worker ID columns. All columns and/or logic that are new or updated will be denoted by an asterisk (*). The asterisk is NOT included in the column names in the actual template.

Column Name	Column Description
Case Number	Displays the case number of the case. Technical Note: <code>CASE.SERIAL_NUM_IDENTIF</code>
Case Name	Displays the case name of the case. Technical Note: <code>CASE.CASE_NAME</code>
*Office Name	Displays the office associated with the worker. Technical Note: <code>OFFICE.OFFICE_NAME</code>

*Unit Name	<p>Displays the unit associated with the worker.</p> <p>Technical Note: UNIT.UNIT_NAME</p>
*Worker ID	<p>Displays the ID of the worker assigned to the program.</p> <p>Technical Note: STAFF_WRKR.WRKR_NUM_IDENTIF</p>
Person Name	<p>Displays the program person's name.</p> <p>Format: [First Name] [Last Name]</p> <p>Technical Note: PERS.FIRST_NAME, PERS.LAST_NAME</p>
DOB	<p>Displays the date of birth of the program person.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: PERS.DOB</p>
CIN	<p>Displays the Client Index Number (CIN) of the program person. This column will be blank if the program person does not have a CIN.</p> <p>Technical Note: PERS.CIN_NUM_IDENTIF</p>
*Program Person Status	<p>Displays the status of the program person.</p> <p>Technical Note: PGM_PERS_DETL.STAT_CODE (CT-72):</p> <ul style="list-style-type: none"> • AC — Active • DE — Denied • DS — Discontinued • IN — Ineligible • PE — Pending
Initial Disposition Event	<p>*Displays the initial disposition event of Approved (CT-157: AA) or Denied (CT-157: DE), if it exists. If there is no Approved or Denied event, Pended is displayed.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> • Approved (AA) • Changed (CH) • Denial Rescinded (RS) • Denied (DE) • Discontinuance Rescinded (DR) • Discontinued (DS) • Pended (PE) • Rescind Approved (Denial) (AE)

	<ul style="list-style-type: none"> • Rescind Approved (Discontinued) (AS) • Retro Approved (AT) • Retro Denial Rescinded (RT) • Retro Denied (DT) • Retro Pended (PT) • Retro Rescind Approved (Denial) (AD) <p>*Technical Note: EVENT.TYPE_CODE (CT-157)</p> <p>Select the EVENT record based on the following hierarchy:</p> <ol style="list-style-type: none"> 1. *Prioritize records with an event type of AA—Approved or DE—Denied, then records where the event type is PE—Pended, and then records of other event types. 2. Then, based on EVENT.EVENT_DATE ascending. 3. Then, based on EVENT.ID ascending.
Initial Pending Date	<p>Displays the initial pending event date. This occurs on or after March 1, 2020 and before PHE Unwinding. The initial pending date should be the first event date on the program.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: EVENT.EVENT_DATE</p>
Initial Disposition Date	<p>Displays the initial approved or denied event date. This can be blank if the application was not approved or denied. If the application was approved or denied, this date must occur during the unwinding period.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: EVENT.EVENT_DATE</p>
Disability Related Application	<p>Displays whether or not this is a disability related application. 'Yes' is displayed when the application is for one of the medical conditions listed in <u>Appendix Item 4.1</u>, otherwise the value is 'No'.</p> <p>Technical Note: This value is 'Yes' based on MED_COND.TYPE_CODE (CT-160) falling under <u>Appendix Item 4.1</u>, otherwise the value is 'No'.</p>

3. **Measure 4:** Update the Measure 4 base population as follows:

Note: New logic criteria will be denoted by an asterisk (*). The base population is expected to be completely new due to requirement changes. The new base population aligns with SIRFRA 1186, as previously mentioned.

- a. The program is Medi-Cal (CT-18: **MC**).
- b. The program is Active (CT-72: **AC**) during the RE Due Month report month.
 - i. ***Technical Note:**
 - 1. PGM_DETL.STAT_CODE (CT-72)
 - 2. First day of RPT_MONTH is between PGM_DETL.BEG_DATE and PGM_DETL.END_DATE.
- c. There exists a program person who is an Active (CT-72: **AC**) Member (CT-201: **ME**) during the RE Due Month report month.
 - i. ***Technical Note:**
 - 1. PGM_PERS_DETL.STAT_CODE (CT-72)
 - 2. PGM_PERS_DETL.ROLE_CODE (CT-201)
 - 3. First day of RPT_MONTH is between PGM_PERS_DETL.BEG_DATE and PGM_PERS_DETL.END_DATE.
- d. One of the following conditions is met:
 - i. The program has a Renewal with a due date in the month that is 2 months ahead of the report month. The aid code is one of those listed in Appendix Item 4.2.

If multiple renewals exist, select the latest based on the following logic:

 - 1. Renewals that are NOT completed or that are completed take precedence over renewals that have a completion reason of No Longer Valid (CT-1892: **NV**).
 - 2. Completion Date descending.
 - 3. Renewal Updated On ascending.
 - ii. **(Former Foster Youth population)** If the program person's date of birth month is the same as the month of the RE Due Date and they are 26 years old at the end of the month of the RE Due Date (which is 2 months ahead of the report month), the program person's effective aid code is 4M – FC Continuing Medi-Cal (CT-184: **4M**).
- e. The EDBC that is Regular (CT-482: **RG**) and Accepted and Saved (CT-274: **AS**) effective in the report month has the following:

Technical Note: EDBC.TYPE_CODE = **RG** and EDBC.RUN_STAT_CODE = **AS**, and EDBC.BEG_DATE <= first day of RPT_MONTH, and EDBC.END_DATE >= first day of RPT_MONTH.

Select the EDBC record associated with the program first based on EDBC.BEG_DATE descending, then EDBC.CREATED_ON descending.

 - i. An associated budget that is Valid (CT-1022: **01**) and a result of Pass (CT-333: **PS**).

Technical Note: BUDGET.CLASS_CODE = **01** and BUDGET.RESULT_CODE = **PS**
 - ii. An associated budget person that is a Program Person (CT-321: **04**) and Member (CT-201: **ME**).

Technical Note: BUDGET_PERS.CLASS_CODE = **04** and BUDGET_PERS.ROLE_CODE = **ME**

- iii. If the program person's date of birth month is the same as the month as of the RE Due Date and they are 26 years old at the end of the month of the RE Due Date (which is 2 months ahead of the report month), the program person's effective aid code is 4M – FC Continuing Medi Cal (CT 184: 4M). *Else, the aid code is one of those listed in Appendix Item 4.2.

4. Measure 4 Columns:

Note: This includes the addition of Office Name, Unit Name, and Worker ID columns. All columns and/or logic that are new or updated will be denoted by an asterisk (*). The asterisk is NOT included in the column names in the actual template.

Column Name	Column Description
Case Number	Displays the case number of the case. Technical Note: CASE.SERIAL_NUM_IDENTIF
Case Name	Displays the case name of the case. Technical Note: CASE.CASE_NAME
*Office Name	Displays the office associated with the worker. Technical Note: OFFICE.OFFICE_NAME
*Unit Name	Displays the unit associated with the worker. Technical Note: UNIT.UNIT_NAME
*Worker ID	Displays the ID of the worker assigned to the program. If one doesn't exist, display "NO WORKER". Technical Note: STAFF_WRKR.WRKR_NUM_IDENTIF <ul style="list-style-type: none"> Select the record where the following points are satisfied. Otherwise, display "NO WORKER". <ul style="list-style-type: none"> The last day of the report month is between PGM_ASSIGN.BEG_DATE and PGM_ASSIGN.END_DATE. PGM_ASSIGN.SECOND_PGM_ASSIGN_IND is NULL or 'N'
Person Name	Displays the program person's name. Format: [First Name] [Last Name] Technical Note: PERS.FIRST_NAME, PERS.LAST_NAME

DOB	<p>Displays the date of birth of the program person.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: PERS.DOB</p>
CIN	<p>Displays the Client Index Number (CIN) of the program person. This column will be blank if the program person does not have a CIN.</p> <p>Technical Note: PERS.CIN_NUM_IDENTIF</p>
*RE Due Date	<p>Displays the RE Due Date, which is two months ahead of the report month.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: REDETER.DUE_DATE</p>

5. **Measure 5 and 7:** Update the Measure 5 and 7 base populations as follows:

Note: New logic criteria will be denoted by an asterisk (*). The base populations are expected to be completely new due to requirement changes. The new base populations align with SIRFRA 1186, as previously mentioned.

Measure 5 Base Population:

- a. The program is Medi-Cal (CT-18: **MC**).
- b. The program is Active (CT-72: **AC**) effective during the RE Due Month report month.
 - i. **Technical Note:**
 1. PGM_DETL.STAT_CODE (CT-72)
 2. Last day of RPT_MONTH is between PGM_DETL.BEG_DATE and PGM_DETL.END_DATE.
- c. There is a program person that is an Active (CT-72: **AC**) Member (CT-201: **ME**) effective during the report month.
 - i. ***Technical Note:**
 1. PGM_PERS_DETL.STAT_CODE (CT-72)
 2. PGM_PERS_DETL.ROLE_CODE (CT-201)
 3. Last day of RPT_MONTH is between PGM_PERS_DETL.BEG_DATE and PGM_PERS_DETL.END_DATE.
- d. *The program has a Renewal with a due date in the report month. If multiple renewals exist, select the latest based on the following logic:
 - i. Renewals that are not completed or that are completed take precedence over renewals that have a completion reason of No Longer Valid (CT-1892: **NV**).
 - ii. Completion Date descending.
 - iii. Renewal Updated On descending ascending.

- e. *The EDBC that is Regular (CT-482: **RG**) and Accepted and Saved (CT-274: **AS**) effective in the report month has the following:

Technical Note: EDBC.TYPE_CODE = **RG** and EDBC.RUN_STAT_CODE = **AS**, and EDBC.BEG_DATE <= last day of RPT_MONTH, and EDBC.END_DATE >= last day of RPT_MONTH.

Select the EDBC record associated with the program first based on EDBC.BEG_DATE descending, then EDBC.CREATED_ON descending.

- i. An associated budget that is Valid (CT-1022: **01**) and a result of Pass (CT-333: **PS**).

Technical Note: BUDGET.CLASS_CODE = **01** and BUDGET.RESULT_CODE = **PS**

- ii. An associated budget person that is a Program Person (CT-321: **04**) and Member (CT-201: **ME**).

Technical Note: BUDGET_PERS.CLASS_CODE = **04** and BUDGET_PERS.ROLE_CODE = **ME**

- iii. The program person's effective aid code during the report month is a MAGI or Non-MAGI aid code listed in [Appendix Item 4.2](#). If a person is assigned multiple aid codes, then one is selected by prioritizing MAGI primary aid codes over secondary aid codes followed by Non-MAGI aid codes over secondary aid codes. Then the latest one by EDBC id is selected.

- iv. *The EDBC for individuals in the stable income population has the following:

1. The individual is found eligible for Non-MAGI, but not through the auto ex-parte or manual ex-parte processes.

a. **Technical Note:**

- i. The aid type is Non-MAGI. For reference, see the Non-MAGI aid codes listed below in [Appendix Item 4.2](#).

- ii. AUTO_AUTH_IND = N and MNL_AUTH_IND = N and ACTIVE_IND = Y. To see the logic related to Auto Ex-Parte and Manual Ex-Parte, see [Appendix Item 4.5](#).

- iii. CURRT_RD_DATE is 1 year ahead of the current report month. For example, for the report month of 12/2024, CURRT_RD_DATE = 12/31/2025.

2. The Medi-Cal EDBC was created 2 months prior to the RE Due Month.

a. **Technical Note:** MC_EDBC.CREATED_ON occurs 2 months prior to the RE Due Month. For example, for an RE Due Month of 12/2024, check that this date is between 10/07/2024 and 10/15/2024 since the stable income batch runs of the 8th business day two months prior to the RE Due Month.

3. The Non-MAGI Auto RE Indicator is 'Y'. This indicates that the RE for a Non-MAGI only program with stable income was advanced by Batch EDBC.

a. **Technical Note:**

MC_EDBC.NON_MAGI_AUTO_RE_IND = Y

4. The EDBC run status is Accepted and Saved (CT-274: **AS**) with a run reason of RE (CT-744: **RE**) and an EDBC source code of Batch EDBC Rules (CT-380: **BE**).

a. **Technical Note:**

i. EDBC.RUN_STAT_CODE = **AS** (CT-274)

ii. EDBC.RUN_RSN_CODE = **RE** (CT-744)

iii. EDBC.EDBC_SOURCE_CODE = **BE** (CT-380)

- f. *The program does **not** have another existing renewal with a due date one to nine months after the report month. This signals a change in circumstance.

i. **Technical Note:** The program does NOT have another existing renewal where REDETER.DUE_DATE is between RPT_MONTH + 1 month, and RPT_MONTH + 9 months.

- g. *The program person does **not** have an existing program person application that was created as of the last day of the report month. The first status on the program person application has a status date greater than or equal to the first day of the RE Due Month.

i. **Technical Note:** The program person does not have a corresponding PERS_APP where the earliest EVENT.EVENT_DATE >= RPT_MONTH.

Measure 7 Base Population:

- a. The program is Medi-Cal (CT-18: **MC**).
- b. *The program has renewal with a due date between April 2023 and the month prior to the report month with no completion date as of the last day of the report month.
- c. *The person did not submit a new application where the first Pending (CT-72: **PE**) status date is between the start of the E-HIT process (Two months prior to the RE Due Month) and the last day of the report month.

i. **Technical Note:** Exclude records where the first Pending event on the latest PERS_APP has an EVENT.EVENT_DATE between REDETER.DUE_DATE – 2 months and the last day of RPT_MONTH.

- d. *The program is Active (CT-72: **AC**) effective two months after the RE Due Month-report month.

i. **Technical Note:**

1. PGM_DETL.STAT_CODE (CT-72)

2. The first day of RPT_MONTH + 2 months is between PGM_DETL.BEG_DATE and PGM_DETL.END_DATE.

- e. *There is a program person that is an Active (CT-72: **AC**) Member (CT-201: **ME**) effective two months after the report month.

i. **Technical Note:**

1. PGM_PERS_DETL.STAT_CODE (CT-72)

2. PGM_PERS_DETL.ROLE_CODE (CT-201)

3. First day of RPT_MONTH + 2 months is between PGM_PERS_DETL.BEG_DATE and PGM_PERS_DETL.END_DATE.

- f. *The program person's EDBC that is effective two months after the RE Due Month has a MAGI or Non-MAGI aid code as defined in Appendix Item 4.2. If a person is assigned multiple aid codes, then one is selected by prioritizing MAGI primary aid codes over secondary aid codes followed by Non-MAGI aid codes over secondary aid codes. Then the latest one by id is selected.
- g. ~~*The program person does not have an existing program person application that was created as of the last day of the report month. The first status on the program person application has a status date greater than or equal to the first day of the RE Due Month.~~
- h. *The latest event on the Medi-Cal program application is not one of the events listed below. These are programs that can be in Pending status due to a rescission event (CT-157).
 - i. **AE** – Rescind Approved (Denial)
 - ii. **AS** – Rescind Approved (Discontinued)
 - iii. **DR** – Discontinuance Rescinded
 - iv. **RS** – Denial Rescinded
 - v. **Note:**
 1. The event date occurs before or during the report month. The effective date occurs after the RE Due Date.
 2. The event on the program is not relevant for the records included in this measure, except that records should be excluded if the latest effective event on the program is rescinded or rescinded approved.

Measure 7 captures the number of beneficiaries due for a renewal since the beginning of the state's unwinding period whose renewal has not yet been completed. So, rescinded programs should not be captured because if a program has a rescind event, that means the program was previously denied or discontinued and the renewal had been completed. **Measure 7 should capture programs with renewals which have never been completed.**

For example, say a program had a renewal due in January and then the program gets denied because of the renewal. If the denial gets rescinded, the program becomes Pending again ~~and is added to the Measure 7 count since the renewal is no longer considered as completed.~~ **However, since the program was already denied at some point, the renewal has been considered completed at least once and therefore shouldn't be counted in Measure 7.**

3. A list of all event types existing in the system is provided in Appendix Item 4.4 as reference.
 - i. *The program has a Renewal with a due date between April 2023 and before or in the month prior to the report month, and no completion

date as of the last day of the report month. If multiple renewals exist, select the latest based on the following logic:

- i. Renewals that are not completed or that are completed take precedence over renewals that have a completion reason of No Longer Valid (CT-1892: **NV**).
- ii. Completion Date descending.
- iii. Renewal Updated On ascending.
- j. *The EDBC that is Regular (CT-482: **RG**) and Accepted and Saved (CT-274: **AS**) effective two months after the report month has the following:
Technical Note: EDBC.TYPE_CODE = **RG** and EDBC.RUN_STAT_CODE = **AS** and EDBC.BEG_DATE <= RPT_MONTH + 2 months and EDBC.END_DATE >= RPT_MONTH + 2 months.
 Select the EDBC record associated with the program first based on EDBC.BEG_DATE descending, then EDBC.CREATED_ON descending.
 - i. An associated budget that is Valid (CT-1022: **01**) and a result of Pass (CT-333: **PS**).
Technical Note: BUDGET.CLASS_CODE = **01** and BUDGET.RESULT_CODE = **PS**
 - ii. An associated budget person that is a Program Person (CT-321: **04**) and Member (CT-201: **ME**).
Technical Note: BUDGET_PERS.CLASS_CODE = **04** and BUDGET_PERS.ROLE_CODE = **ME**
 - iii. The program person's effective aid code during the report month is a MAGI or Non-MAGI aid code listed in Appendix Item 4.2. If a person is assigned multiple aid codes, then one is selected by prioritizing MAGI primary aid codes over secondary aid codes followed by Non-MAGI aid codes over secondary aid codes. Then the latest one by EDBC id is selected.

6. Measure 5 and 7 Columns:

Note: This includes the addition of Office Name, Unit Name, and Worker ID columns. All columns and/or logic that are new or updated will be denoted by an asterisk (*). The asterisk is NOT included in the column names in the actual template.

Column Name	Column Description
Case Number	Displays the case number of the case. Technical Note: CASE.SERIAL_NUM_IDENTIF
Case Name	Displays the case name of the case. Technical Note: CASE.CASE_NAME
*Office Name	Displays the office associated with the worker. Technical Note: OFFICE.OFFICE_NAME
*Unit Name	Displays the unit associated with the worker.

	Technical Note: UNIT.UNIT_NAME
*Worker ID	<p>Displays the ID of the worker assigned to the program. If one doesn't exist, display "NO WORKER".</p> <p>Technical Note: STAFF_WRKR.WRKR_NUM_IDENTIF</p> <ul style="list-style-type: none"> Select the record where the following points are satisfied. Otherwise, display "NO WORKER". <ul style="list-style-type: none"> The last day of the report month is between PGM_ASSIGN.BEG_DATE and PGM_ASSIGN.END_DATE. PGM_ASSIGN.SECOND_PGM_ASSIGN_IND is NULL or 'N'
Person Name	<p>Displays the program person's name.</p> <p>Format: [First Name] [Last Name]</p> <p>Technical Note: PERS.FIRST_NAME, PERS.LAST_NAME</p>
DOB	<p>Displays the date of birth of the program person.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: PERS.DOB</p>
CIN	<p>Displays the Client Index Number (CIN) of the program person. This column will be blank if the program person does not have a CIN.</p> <p>Technical Note: PERS.CIN_NUM_IDENTIF</p>
*Ex-Parte EDR Approval Date	<p>Displays the batch date the program person was found eligible for MAGI through the ex-parte process meeting the following conditions:</p> <ul style="list-style-type: none"> The CalHEERS determination response (EDR) has a type code equal to Determination Response (CT-297: RE DR). The EDR's effective date is equal to the month prior to the RE Due Month. The EDR Run Reason is equal to RE (CT-395: RE). The EDR has a batch indicator set to 'Y'. The EDR has the MAGI Medi-Cal status set to Eligible (CT-402: EL) or Conditionally Eligible (CT-402: CE). The person does not have an existing CalHEERS eligibility reason of Soft Pause (CT-466: SP).

	<p>Format: MM/DD/YYYY</p> <p>Technical Note: CH_TRANSACTION.INFO.REF_TIMESTAMP</p>
*Manual Ex-Parte Approval Date	<p>Displays the EDBC Run Date if the program person was found eligible for MAGI or Non-MAGI through the manual ex-parte process meeting the following conditions:</p> <p>MAGI:</p> <ul style="list-style-type: none"> The EDBC Type is Regular (CT-482: RG). OR The EDBC Type is Read Only (CT-482: RO) and the EDBC Type Reason is Benefit Re Run (CT-502: BR). The EDBC Run Status is Accepted and Saved (CT-274: AS). The EDBC Run Reason is RE (CT-744: RE). The EDBC was run through Online Eligibility Rules (CT-380: OE). The EDBC Begin Date is between one month prior to the RE Due Month and the last day of the report month. The EDBC Run Date is between 3 months prior to the RE Due Month and the last day of the report month. The program does not have an existing customer report with a Sent status (CT-274: SE) with a submit month within one month prior to the RE Due Month and one month after the report month for the Medi-Cal (CT-18: MC) program. The program did not go through Auto Ex-Parte. We give priority to Auto Ex-Parte determinations. <p>Non-MAGI:</p> <ul style="list-style-type: none"> The program person has an existing EDBC record where the begin date is between three months prior to the RE Due Month and one month after the RE Due Month. The EDBC has a Non-MAGI Auto Ex-Parte Indicator set to 'Yes'. Note this indicator is not viewable through the web application. The program did not go through Auto Ex-Parte. We give priority to Auto Ex-Parte determinations. <p>Format: MM/DD/YYYY</p>

	Technical Note: EDBC.RUN_DATE
*Beneficiary Provided Information	<p>Displays the EDBC Run Date of the EDBC that found the program eligible if they were approved but not through the auto ex-parte or manual ex-parte processes. The column will be blank otherwise.</p> <ul style="list-style-type: none"> The renewal was advanced, but the program does not meet the criteria for Auto Ex-Parte or Manual Ex-Parte. See the logic in the Resulting Program Person Status on which EDBC record to choose. <p>Technical Note: EDBC.RUN_DATE</p>
RE Due Date	<p>Displays the RE Due Date.</p> <p>Technical Note: REDETER.DUE_DATE</p>
RE Completion Date	<p>Displays the RE Completion Date.</p> <p>Technical Note: REDETER.COMPL_DATE</p>
Resulting Program Person Status	<p>*Displays the resulting program person status for redeterminations due in the report month that are completed as of the last day of the report month. The column will be blank for redeterminations which are not completed in the report month.</p> <p>Possible Values (CT-72):</p> <ul style="list-style-type: none"> Active – <ul style="list-style-type: none"> The person was approved through Auto Ex-Parte. The person was approved through Manual Ex-Parte. The person's RE was processed and they are an Active Member. Denied – The resulting program person status is Denied (CT-72: DE). Discontinued – The resulting program person status is Discontinued (CT-72: DS) OR the person's role is NOT Member (CT-201: ME). <p>Technical Note: Select an EDBC using the following hierarchy logic:</p> <ol style="list-style-type: none"> Grab the resulting program person status from the latest EDBC that has an RE Run Reason that meets the following criteria:

	<ul style="list-style-type: none"> • The EDBC type is Regular (CT-482: RG). OR The EDBC Type is Read Only (CT-482: RO) and the Type Reason is Benefit Month Rerun (CT-502: BR). • The EDBC status is Accepted and Saved (CT-274: AS). • The EDBC Run Reason is RE (CT-744: RE). OR The EDBC Person Status Reason is Failed to Complete Determination (CT-73: 16). OR The EDBC Person Status Reason is Failed to Complete Redetermination (CT-73: RD). • The EDBC Run Date is between three months prior to the report month until the last day of the report month. • The EDBC is effective the month after the report month. • The program person class is Program Person (CT-321: 04). • When multiple EDBC exist, one is selected based on the EDBC run date in ascending order, followed by the EDBC begin date in ascending order, then the EDBC created on date in ascending order. <p>2. Else grab the resulting program person status from the latest EDBC with any Run Reason that meets the following criteria:</p> <ul style="list-style-type: none"> • The EDBC type is Regular (CT-482: RG). • The EDBC status is Accepted and Saved (CT-274: AS). • The program person class is Program Person (CT-321: 04). • The EDBC is effective the month after the report month. • When multiple EDBC exist, one is selected based on the EDBC run date in ascending order, followed by the EDBC begin date in ascending order, then the EDBC created on date in ascending order. <p>Display EDBC_PERS.STAT_CODE (CT-72).</p>
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Resulting Program Person Role	<p>Displays the resulting program person role for redeterminations due in the report month that are completed as of the last day of the report month. The column will be blank for redeterminations which are not completed in the report month.</p> <p>Values:</p> <ul style="list-style-type: none"> • FRE – Financially Responsible – Excluded • FRI – Financially Responsible – Included • FSO – Family Size Only • MEM – Member • MMO – Medi-Cal Member Only • UP – Unaided Person <p>Technical Note: PGM_PERS_DETL.ROLE_CODE (CT-201)</p>
Advanced RE Due Date	<p>Displays the RE Due Date of the RE following the RE that is completed before or during the report month (if it exists), which must have either no completion reason or a completion reason which is NOT No Longer Valid (CT-1892: NV). Otherwise, this can be blank.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: REDETER.DUE_DATE</p>
Ex-Parte Indicator	<p>Displays whether or not the program person received a Renewal final determination through the Ex-Parte process. The value is 'Yes' if there is an associated date for the Ex-Parte EDR Approval Date or the Manual Ex-Parte Approval Date columns, otherwise 'No' is displayed.</p>
Failure to Respond Status Reason	<p>Displays the status reason if the Resulting Program Person Status is Denied or Discontinued. Otherwise, this can be blank.</p> <p>Possible Values, including but not limited to (CT-73):</p> <ul style="list-style-type: none"> • Child of FTP Income • Child of FTP Property ... <p>Note: For the full list of possible values, please see Appendix Item 4.3.</p> <p>Technical Note: EDBC_PERS.STAT_RSN_CODE (CT-73)</p>
Packet Type	<p>Displays the type of packet which was sent. The packet effective month is between 2 months prior to the report</p>

	<p>month and the report month. Otherwise, this column can be blank.</p> <p>Possible Values (CT-329):</p> <ul style="list-style-type: none"> • Former Foster Youth Packet (FY) • MAGI RE Packet (MG) • Mixed Household RE Packet (MI) • Non-MAGI RE Packet (MR) <p>Technical Note: CUST_RPT.TYPE_CODE (CT-329)</p>
Packet Sent Date	<p>Displays the date when the packet was sent, which must occur before the EDBC run date. The packet effective month is between 2 months prior to the report month and the report month. Otherwise, this column can be blank.</p> <p>Format: MM/DD/YYYY</p> <p>Technical Note: CUST_RPT_PGM_TYPE_DETL.STAT_DATE</p>

2.1.4 Report Location

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

2.1.5 Counties Impacted

All counties will be impacted by the changes in this SCR.

2.1.6 Security Updates

1. Security Rights

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


2. Security Groups

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

2.1.7 Report Usage/Performance

No significant changes in report usage or performance are expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	DHCS CMS Unwinding Eligibility and Enrollment Data Detail Mockup	 DHCS CMS Unwinding Eligibility &

4 APPENDIX

4.1 Medical Condition Types (CT-160)

Medical Condition Type Code	Medical Condition Description
01	SSA Disabled
02	SP-DDSD Disabled
03	SSA Blind
04	SP-DDSD Blind
06	Presumptive Amputation of a Leg at the Hip
07	Presumptive Allegation of Total Deafness
08	Presumptive Allegation of Total Blindness
09	Presumptive Allegation of Bed Confinement
10	Presumptive Allegation of Stroke
11	Presumptive Allegation of Cerebral Palsy
12	Presumptive Allegation of Muscular Dystrophy
14	Presumptive Allegation of Down Syndrome
15	Presumptive Allegation of Mental Retardation
16	Presumptive Birth Weight Below 2 lbs.10 oz.
17	Presumptive Human Immunodeficiency Virus (HIV)
18	Presumptive Gestational Age/Weight at Birth
19	Presumptive Terminally Ill
20	Presumptive Nonambulatory/Spinal Cord Injury
21	Limited Services – Tuberculosis
22	Limited Services – Kidney Dialysis
23	Limited Services – TPN
24	Incapacity – Verifiable and at Least 30 Days
25	Presumptive Allegation of ALS (Lou Gehrigs)
26	Presumptive End Stage Renal Disease
27	Fry v. Saenz Disability
28	SP-DDSD Pending
30	SSI Blind
31	SP-DDSD Presumptive Approval

4.2 MAGI and Non-MAGI Aid Codes (CT-184)

MAGI Aid Codes:

Aid Code	Aid Code Description
PRIMARY AID CODES	
2A	Abandoned Baby
3N	AFDC-1931 (B) Full
3V	AFDC-1931 (B)-ESO/Pregnancy
47	200%-Infant-Full
69	200% OBRA Infant
72	133% Child-Full
74	133%-Child-ESO
7A	100% Child-Full
7C	100% Child-OBRA-ESO
8N	133% Excess Property Child-ESO
8P	133% Excess Property Child-Full
8R	100% Excess Property Child-Full
8T	100% Excess Property Child-ESO
H1	Infant 200-250%
H2	Child 1-6 133-150%
H4	Child 6-19 100-150%
L6	Citizen/Lawfully Present 19-64 Years Old 128% Full
L7	Undocumented 26-49 Years Old 128% Restricted
M1	19-64 Year Old 138% Full
M2	26-49 Years Old 138% Restricted
M3	Parent Caretaker Relative – at or below 109% – Full
M4	Parent Caretaker Relative – at or below 109% – Restricted
M5	Child 6-19 – 108-133% – Citizen
M6	Child 6-19 – 108-133% - Undocumented
M7	Pregnant Women – 138% – Citizen
M8	Pregnant Women – 138% – Undocumented
P0	Infant – 0-208% – Undocumented

P5	Child 6-19 – 0-133% – Citizen
P6	Child 6-19 – 0-133% – Undocumented
P7	Child 1-6 – 0-142% – Citizen
P8	Child 1-6 0-142% – Undocumented
P9	Infant – 0-208% – Citizen
T0	Infant – 208-266% – Undocumented
T2	Child 6-19 – 133-160% – Citizen
T4	Child 1-6 – 142-160% – Citizen
T5	Infant – 208-266% – Citizen
T7	Child 6-19 – 133-160% – Undocumented
T9	Child 1-6 – 142-160% – Undocumented
SECONDARY AID CODES	
44	200%-Pregnancy Citizen
48	200%-Pregnancy-OBRA
H3	Child 1-6 150-250% P
H5	Child 6-19 150-250% P
K6	MAGI ACA N/E Adult (19 – 64) County Comp Release/ <138% FPL, Citizen
K7	MAGI ACA N/E Adult (19 - 64) County Comp Release/ <138% FPL, Undoc
K8	MAGI ACA NNE Adult (19 - 64) County Comp Release/ <128% FPL, Citizen
K9	MAGI ACA NNE Adult (19 - 64) County Comp Release/ <128% FPL, Undoc
M0	Pregnant Women -139-213% - Undocumented
M9	Pregnant Women - 138-213% - Citizen
N7	19-64 Year Old County Inmate - 0-138% - Limited
N8	19-64 Year Old County Inmate - 0-138% - Restricted
T1	Child 6-19 - 160-266% - Citizen
T3	Child 1-6 - 160-266% - Citizen
T6	Child 6-19 - 160-266% - Undocumented
T8	Child 1-6 - 160-266% - Undocumented

Non-MAGI Aid Codes:

Aid Code	Aid Code Description
PRIMARY AID CODES	
13	LTC-Aged
14	MN-Aged-No SOC
16	Pickle-Aged
17	MN-Aged-SOC
1H	FPL-Aged-Full-No SOC
1U	FPL-Aged-ESO-No SOC
1X	MSSP without a SOC
1Y	MSSP with a SOC
23	LTC-Blind
24	MN-Blind-No SOC
26	Pickle-Blind
27	MN-Blind-SOC
2H	FPL-Blind-Full-No SOC
34	AFDC-MN-No SOC
36	Disabled-COBRA-Widow/ers
37	AFDC-MN-SOC
55	OBRA-LTC-MI
59	Continuing TMC-Full
5J	Pending SP-DDSD - No SOC-Restrict.
5R	Pending SP-DDSD – SOC
5T	Continuing TMC-ESO/Pregnancy
5V	Trafficking/Crime Victim no SOC
63	LTC-Disabled
64	MN-Disabled-No SOC
66	Pickle-Disabled
67	MN-Disabled-SOC
6A	DAC-Blind
6C	DAC-Disabled
6G	250% Working Disabled-Full
6H	FPL Disabled-Full
6J	SB87 Pending SP-DDSD - No SOC

6R	SB87 Pending SP-DDSD – SOC
6U	FPL-Disabled-ESO/Pregnancy
6V	DDS Waiver-No SOC
6W	DDS Waiver-SOC
6X	IHO Waiver - No SOC
6Y	IHO Waiver – SOC
7J	CEC-Full
82	MI-Child-No SOC
83	MI-Child-SOC
86	MI-Pregnancy-No SOC
87	MI-Pregnancy-SOC
C1	OBRA-MN-Aged-No SOC
C2	OBRA-MN-Aged-SOC
C3	OBRA-MN-Blind-No SOC
C4	OBRA-MN-Blind-SOC
C5	OBRA-MN-AFDC-No SOC
C6	OBRA-MN-AFDC-SOC
C7	OBRA-MN-Disabled-No SOC
C8	OBRA-MN-Disabled-SOC
C9	OBRA-MI-Child-No SOC
D1	OBRA-MI-Child-SOC
D2	OBRA-LTC-Aged-No SOC
D3	OBRA-LTC-Aged-SOC
D4	OBRA-LTC-Blind-No SOC
D5	OBRA-LTC-Blind-SOC
D6	OBRA-LTC-Disabled-No SOC
D7	OBRA-LTC-Disabled-SOC
D8	OBRA-MI-Pregnancy-No SOC
D9	OBRA-MI-Pregnancy-SOC
SECONDARY AID CODES	
76	Postpartum
7H	TB
80	QMB

8A	QWDI
8C	SLMB
8D	Qualified Individual 1-135%
F3	MC County Inmate Inpatient Hospital Only
F4	MC Undoc County Inmates
G1	MC SOC State Inmates
G3	Medi-Cal County Inmate SOC Inpatient Hospital Only
G4	Medi-Cal County Inmate Undoc SOC Inpatient Hospital Pregnancy+ ESO
G5	County Juvenile Inmate Inpatient Hospital+ Inpatient MH
G6	County Juvenile Inmate Undoc, ESO Inpatient Hospital, MH & Pregnancy
G7	County Juvenile Inmate, SOC Inpatient Hospital & Inpatient MH
G8	County Juvenile IM Undoc, SOC, ESO Inpatient Hospital, MH & Pregnancy
J1	Compassionate Release No SOC County
J2	Compassionate Release SOC County
J3	County Medical Probation No SOC
J4	County Medical Probation SOC
J5	Compassionate Release LTC Aged County
J6	Compassionate Release LTC Aged County Restricted
J7	Compassionate Release LTC Disabled County
J8	Compassionate Release LTC Disabled County Restricted

4.3 Program Person Status Reasons (CT-73)

Status Reason Code	Status Reason Description
13	Real Property
14	Other Property
16	Failed to Complete Determination
82	FTP Eligibility Forms
83	FTP Verification
9Q	FTP Proof Citizenship
C8	FTP Property

C8A	Spouse of FTP Property
C8B	Child of FTP Property
ES	FTP County Residence (Negative Action)
G2	Failed Property
I8	FTP Required Info
JT	FTP Other Health Care
JU	FTP Age Verification
K7	Spouse of FTP Income
K8	Child of FTP Income
KF	Failure to Provide
KP	FTP One Vehicle
KQ	FTP Multiple Vehicles
ML	Failed to verify LTC
N01	FTP Proof Earned Income
N02	FTP Proof Unearned Income
N03	FTP Proof/Lotto Gambling Income
N05	FTP Proof Student Income
N13	Incarcerated Juvenile (MediCal)
N20	FTP Proof Liquid Property
N23	FTP Proof Vehicle Property
N40	FTP Proof Shelter Expense
N41	FTP Proof Utility Expense
N42	FTP Proof Dependent Care Expense
N43	FTP Proof Medical Care Expense
N80	FTP Proof Citizenship
N81	FTP Proof Marital Status
N82	FTP California Residency
N83	FTP Proof Medical Condition
N84	FTP Proof Relationship
NC8	FTP Property for NOA
NDW	FTP Income for NOA
RD	Failed to Complete Redetermination
RS	FTP County Residence

4.4 Event Types (CT-157)

Please note that the event type is not relevant for selecting records for Measure 7, except the four rescission events as mentioned in the Measure 7 base population and denoted with an asterisk (*) below. This comprehensive event type list is only provided as additional information on existing event types in the system.

Event Type Code	Event Type Description
AA	Approved
AD	Retro Rescind Approved (Denial) Note: An example of when this event might be used is if a person applies for a prior month benefit, such as if they had an injury 1 month ago, but they are applying for benefits today. They were denied for those benefits for an injury that took place 1 month ago, but the denial gets rescinded, and the rescission gets approved. This rescission event is not relevant though because it does not apply to renewals.
*AE	Rescind Approved (Denial)
*AS	Rescind Approved (Discontinued)
AT	Retro Approved
CH	Changed
DE	Denied
*DR	Discontinuance Rescinded
DS	Discontinued
DT	Retro Denied
PE	Pended
PT	Retro Pended
RA	Restoration of Aid Waiver Approved
RD	Restoration of Aid Waiver Denied
RR	Restoration of Aid Waiver Rescinded Note: This rescission event is not relevant since Restoration of Aid does not apply to Medi-Cal programs.
*RS	Denial Rescinded
RT	Retro Denial Rescinded

Note: An example of when this event might be used is if a person applies for a prior month benefit, such as if they had an injury 1 month ago, but they are applying for benefits today. They were denied for those benefits for an injury that took place 1 month ago, but the denial gets rescinded.

This rescission event is not relevant though because it does not apply to renewals.

4.5 Measure 5 Stable Income Logic

The following logic are used for the points in the stable income population.

Auto Auth Indicator: (AUTO_AUTH_IND)

- This value is Y when all of the following are satisfied:
 - The Auto Auth EDBC value is Y.
 - **Technical Note:** AUTO_AUTH = Y
 - The Auto Auth Date is less than or equal to the completion date, or the completion date is NULL, or the year of the completion date is 9999.
 - **Technical Note:** AUTO_AUTH_DATE <= REDETER.COMPL_DATE, or REDETER.COMPL_DATE is NULL, or year of REDETER.COMPL_DATE = '9999'.
 - The Auto Auth Date is less than or equal to the discontinuance date, or the discontinuance date is NULL, or the year of the discontinuance date is 9999.
 - **Technical Note:** AUTO_AUTH_DATE <= DISC_DATE, or DISC_DATE is NULL, or year of DISC_DATE = '9999'.
- Otherwise, this value is N.

Manual Auth Indicator: (MNL_AUTH_IND)

- This value is Y when all of the following are satisfied:
 - The Manual Auth EDBC value is Y.
 - **Technical Note:** MNL_AUTH = Y
 - The Manual Auth Date is less than or equal to the completion date, or the completion date is NULL, or the year of the completion date is 9999.
 - **Technical Note:** MNL_AUTH_DATE <= REDETER.COMPL_DATE, or REDETER.COMPL_DATE is NULL, or year of REDETER.COMPL_DATE = '9999'.

- The Auto Auth Date is less than or equal to the discontinuance date, or the discontinuance date is NULL, or the year of the discontinuance date is 9999.
 - **Technical Note:** MNL_AUTH_DATE <= DISC_DATE, or DISC_DATE is NULL, or year of DISC_DATE = '9999'.
- Otherwise, this value is N.

Active Indicator: (ACTIVE_IND)

- This value is Y when:
 - The program person has a status of **AC** – Active and role of **ME** – Member.
 - **Technical Note:** PGM_PERS_DETL.STAT_CODE = 'AC' (CT-72) and PGM_PERS_DETL.ROLE_CODE = 'ME' (CT-201)
 - OR
 - The Rescind Before RE value is Y.
 - **Technical Note:** RESCIND_BEFORE_RE = Y
- Otherwise, this value is N.

Current RE Due Date: (CURRT_RD_DATE)

- Take the latest RE Due Date for a program.

ADDITIONAL SUB-LOGIC USED ABOVE:

Auto Auth Date: (AUTO_AUTH_DATE)

- Take the EDBC.RUN_DATE from **Auto Auth EDBC**.

Auto Auth EDBC: (AUTO_AUTH)

- This value is Y when there is a corresponding EDBC record which fulfills the following:
 - The EDBC type is **RG** – Regular, OR the EDBC type is **RO** – Read Only with a type reason code of **BR** – Benefit Month Re-run.
 - **Technical Note:** EDBC.TYPE_CODE (CT-482), EDBC.TYPE_RSN_CODE (CT-502).
Select a record based on EDBC.BEG_DATE ascending, then EDBC.CREATED_ON ascending.
 - The EDBC run status is **AS** – Accepted and Saved.
 - **Technical Note:** EDBC.RUN_STAT_CODE (CT-274)
 - The EDBC run reason is **RE** – RE.
 - **Technical Note:** EDBC.RUN_RSN_CODE (CT-744)
 - The EDBC source code is **BE** – Batch EDBC Rules.

- **Technical Note:** EDBC.EDBC_SOURCE_CODE (CT-380)
- The EDBC begin date occurs during or later than the previous report month.
 - **Technical Note:** EDBC.BEG_DATE >= RPT_MONTH – 1 month
- The EDBC run date occurs during or later than 2 months prior to the report month.
 - **Technical Note:** EDBC.RUN_DATE >= RPT_MONTH – 2 months
- There exists a corresponding CH_TRANSACT_INFO record which fulfills the following:
 - The record type is **ED** – Eligibility Determination Request.
 - **Technical Note:** CH_TRANSACT_INFO.TYPE_CODE (CT-297)
 - The run reason is **RE** – Renewal – batch administrative renewal.
 - **Technical Note:** CH_TRANSACT_INFO.RUN_RSN_CODE (CT-395)
 - The effective date is in the prior report month.
 - **Technical Note:** CH_TRANSACT_INFO.EFF_DATE = RPT_MONTH – 1 month
 - The MAGI eligibility status is **EL** – Eligible.
 - **Technical Note:** CH_ELIG_DETL.ELIG_MAGI_MC_STAT_CODE (CT-402)

Discontinuance Date: (DISC_DATE)

- When the discontinuance indicator is Y, AND the Rescind Before RE value is NULL or N, use the EDBC run date.
 - **Technical Note:** EDBC.RUN_DATE when DISC_IND = 'Y', AND RESCIND_BEFORE_RE is NULL or 'N'.
- Otherwise, this value is NULL.

Discontinuance Indicator: (DISC_IND)

- This value is Y when:
 - The **Rescind Before RE** value is NULL or **N**, and the person role is NOT **ME** – Member:
 - **Technical Note:** RESCIND_BEFORE_RE is NULL or 'N', and PGM_PERS_DETL.ROLE_CODE is NOT 'ME' (CT-201)
 - OR
 - The **Rescind Before RE** value is NULL or **N**, and the person status is NOT **AC** – Active:

- **Technical Note:** RESCIND_BEFORE_RE is NULL or 'N', and PGM_PERS_DETL.STAT_CODE is NOT 'AC' (CT-72)
- This value is N when:
 - The Rescind Before RE value is Y.
 - **Technical Note:** RESCIND_BEFORE_RE = Y
- Else, this value is N.

Manual Auth Date: (MNL_AUTH_DATE)

- Take the EDBC.RUN_DATE from **Manual Auth EDBC**.

Manual Auth EDBC: (MNL_AUTH)

- This value is Y when there is a corresponding EDBC record which fulfills the following:
 - The EDBC type is **RG** – Regular, OR the EDBC type is **RO** – Read Only with a type reason code of **BR** – Benefit Month Re-run.
 - **Technical Note:** EDBC.TYPE_CODE (CT-482), EDBC.TYPE_RSN_CODE (CT-502).
Select a record based on EDBC.BEG_DATE ascending, then EDBC.CREATED_ON ascending.
 - The EDBC run status is **AS** – Accepted and Saved.
 - **Technical Note:** EDBC.RUN_STAT_CODE (CT-274)
 - The EDBC run reason is **RE** – RE.
 - **Technical Note:** EDBC.RUN_RSN_CODE (CT-744)
 - The EDBC source code is **OE** – Online EDBC Rules.
 - **Technical Note:** EDBC.EDBC_SOURCE_CODE (CT-380)
 - The EDBC begin date occurs during or later than the previous report month.
 - **Technical Note:** EDBC.BEG_DATE >= RPT_MONTH – 1 month
 - The EDBC run date occurs during or later than 3 months prior to the report month.
 - **Technical Note:** EDBC.RUN_DATE >= RPT_MONTH – 3 months

Rescind Before RE: (RESCIND_BEFORE_RE)

- This value is **Y** when the program does have a rescind event before or during the report month.
 - **Technical Note:** EVENT.EVENT_DATE <= RPT_MONTH and EVENT.TYPE_CODE = **AS** (CT-157)
- This value is **N** when the program does not have a rescind event before the report month.
 - **Technical Note:** EVENT.EVENT_DATE > RPT_MONTH and EVENT.TYPE_CODE = **AS** (CT-157)

Design

CA-273875 CA 237 CW Update SAR 7
Discontinuance Logic and Multiple
Applications Dispositioned Scenarios

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Susanna Martinez	
	Reviewed By	Ravneet Bhatia, Gokul Suresh, Thao Ta	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/11/2025	1.0	Initial document	Susanna Martinez

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CA-273875 – CA 237 CW Update SAR 7 Discontinuance Logic and Multiple Applications Dispositioned Scenarios

1 OVERVIEW

ACL 15-46E updated reporting instructions for CA 237 CW to provide clarification on reporting Semi-Annual Reporting (SAR) 7 discontinuances. The CA 237 CW is already capturing SAR 7 discontinuances done via batch but not capturing SAR 7 discontinuances when the action is taken by the worker by the sixth calendar day after the end of the SAR 7 submit month and will need to be adjusted to accurately report these in the line 9: *Cases discontinued during the month* count.

Additionally, there is reconciliation issues occurring in the CA 237 CW report between line 6 + line 7 not equaling line 8. This is due to the way the report is currently counting multiple approved applications for the same case. This will require correcting to appropriately handle rare scenarios involving multiple approved applications.

1.1 Current Design

The SAR 7 discontinuance logic for the CA 237 CW and CA 253 only counts cases as discontinued via an automated SAR 7 discontinuance batch job due to failure to provide a completed SAR 7 for the report month. This SAR 7 discontinuance batch runs the first business night after the report month and retroactive discontinuances are done by this batch on the second business night after the report month. If a worker runs EDBC to discontinue after the end of the submit month, these SAR 7 discontinuances are not being counted in the report month as these are independent of the SAR 7 discontinuance batch job records.

Additionally, there are rare scenarios when applications that are approved are being counted multiple times on the CA 237 CW when the effective dates are for prior months. This is causing an issue with reconciling when counties are submitting. In the CA 237 CW, Line 6 + 7 must equal Line 8 (and CA 237 CW Line 8 Backup Report) but they are not reconciling.

1.2 Requests

1. Update the CA 237 CW and CA 253 SAR 7 discontinuance logic to capture SAR 7 discontinuances when the action is taken by the worker by the sixth calendar day after the end of the SAR 7 submit month.
2. Update the CA 237 CW logic to account for multiple applications scenarios:
 - a. Separate applications for the same case that is not yet active, that are approved for different effective months within the same report month.
 - b. An application for a case that is already Active and approved for a prior effective month (retro month).

1.3 Overview of Recommendations

1. Update the CA 237 CW and CA 253 SAR 7 discontinuance logic to capture SAR 7 discontinuances when the action is taken by the worker by the sixth calendar day after the end of the SAR 7 submit month.
2. Update the CA 237 CW logic to account for multiple applications scenarios:
 - a. Separate applications for the same case that is not yet active, that are approved for different effective months within the same report month.
 - b. An application for a case that is already Active and approved for a prior (retro) effective month.

Note: If a case is already Active as of a prior month, this case would be carried forward and therefore it's approval in any subsequent months should not get counted in line 7: *Cases added during the month* while the case continues to be Active and carried forward in other report months as per ACL 15-46E.

1.4 Assumptions

1. The CA 237 CW line 9: *Cases discontinued during the month* is to reconcile with CA 253 CW line 1: *Total cases discontinued during the month*.
2. Calendar days do not exclude holidays or Sundays. Holidays and Sundays are counted as a calendar day.
3. The CA 237 CW and CA 253 CW already count SAR 7 discontinuances done by batch that are discontinued effective the second business day following the end of the report month.
4. The CA 237 CW line 4b: *Applications disposed of during the month – Applications denied* is to reconcile with CA 255 line 1: *Total case denials of cash grant during the month*.
5. The CA 237 CW report should not count multiple approved applications for the same case processed in the report month. This is to ensure the report provides a distinct approval case count in line 7 which must equal and auto populates line 4a. However, the CA 237 CW report does provide multiple counts of each denied application processed in the report month. Thus, the CA 237 CW line 4b and CA 255 CW line 1 count each application meeting the criteria of a denied application.
6. When two applications are processed in the report month and one distinct application (unique ID) meets the criteria of an approved application and the other distinct application (unique ID) meets the criteria of a denied application for a different effective month, both the approved and denied application is counted in line 4 but only the approved application is counted as one case added during the report month, only when there is no active case carried forward from the prior report month.
7. In the CA 237 CW, line 6 - *Cases carried forward from last month* plus line 7 - *Cases added during the month* must equal line 8 - *Total cases open during the month* (and the CA 237 CW Line 8 Backup Report).

8. The only impact to the logic for the CA 253 report, which is reflected on the CA 237 CW, is the update to how the SAR 7 discontinuances will be captured.

2 RECOMMENDATIONS

2.1 CA 237 CW

2.1.1 Overview

The CA 237 CW state report provides information on CalWORKs caseload movement for Two Parent Families, Zero Parent Families, All Other Families, TANF Timed-Out, Safety Net, Fleeing Felon and Long-Term Sanction cases. It includes information on applications requested or restored, the number of cases added during the month, the number of cases exiting during the month, and the number of cases transferred from other counties during the month. This report is scheduled to be available monthly.

Currently the SAR 7 discontinuance logic only counts cases that were discontinued by the SAR 7 discontinuance batch. This SAR 7 discontinuance batch runs the first business night after the report month and retroactive discontinuances are done by this batch on the second business night after the report month. A worker can also run EDBC to discontinue the program for reasons due to SAR 7 within the first 6 calendar days following the end of the report month. For example, if we have report month of 01/2025 and the worker discontinues the program for reasons due to SAR 7 on 02/02/2025, this is not getting captured in the report.

Additionally, the report is currently counting multiple applications for the same case in scenarios where applications are approved for different effective months.

The SAR 7 discontinuance logic will be updated to capture instances when the SAR 7 discontinuance is performed by a worker up to 6 calendar days following the end of the report month.

The report logic will be updated to not count multiple applications when handling the following scenarios:

- Scenario 1: Separate applications for the same case that is not yet active, that are approved for different effective months within the same report month.
- Scenario 2: An application for a case that is already Active and approved for a prior (retro) effective month.

2.1.2 CA 237 CW Mockup

DOWNLOAD REPORT FORM FROM:

<http://www.cdss.ca.gov/dssdb>

E-MAIL COMPLETED REPORT FORM TO:

dssdb@dss.ca.gov

COUNTY NAME	VERSION	REPORT MONTH	REPORT YEAR
San Bernardino	<input type="checkbox"/> INITIAL <input type="checkbox"/> REVISED	January	2025

1. Applications/requests carried forward from last month	1	2,277
a. Item 5 from last month's report, as reported to CDSS	2	2,296
b. Adjustment (Item 1 minus Item 1a, positive or negative number, explain in Comments if not 0)	3	-19
2. Applications/requests received during the month (Item 2a plus Item 2b)	4	2,975
a. Applications	5	2,524
b. Requests for restoration	6	451
3. Total applications on hand during the month (Item 1 plus Item 2)	7	5,252
4. Applications disposed of during the month (Sum of Items 4a, 4b and 4c)	8	3,231
a. Applications approved [Item 7a plus Item 7b (all columns)]	9	791
b. Applications denied (Same as Item 1, CA 255 CW)	10	2,072
1) Applications denied due to receipt of Diversion payments or services (Same as Item 10, CA 255 CW)	11	0
c. Other application dispositions (cancellations and withdrawals) (Same as Items 11 plus 12, CA 255 CW)	12	368
5. Applications/requests pending at the end of the month (Item 3 minus Item 4)	13	2,021

Cases Added

PART B. CASELOAD (ALL)		Two-Parent Families (A)		Zero Parent Families (B)		All Other Families (C)		TANF Timed Out Cases (D)		LT Sanction/ SN/FF (E)	
Cases Added											
6. Cases carried forward from last month		14	2,642	15	6,697	16	8,872	17	5,052	18	4,986
a. Item 12 from last month's report, as reported to CDSS		19	2,659	20	6,749	21	8,940	22	5,093	23	5,046
b. Adjustment (Item 6 minus Item 6a, positive or negative number, explain in Comments if not 0)		24		25		26		27		28	
			-17		-52		-68		-41		-60
7. Cases added during the month (Sum of Items 7a through 7d)		29	225	30	255	31	740	32	262	33	214
a. Applications approved		34	77	35	76	36	317	37	50	38	28
b. Restorations approved		39	33	40	32	41	82	42	49	43	47
c. Transfers from other counties		44	11	45	24	46	25	47	17	48	14
d. Other approvals (appeal cases, SAR 7s, etc.)		49	104	50	123	51	316	52	146	53	125
1) Other approvals due to AR 950 SAR 7c		54	3	55	2	56	18	57	9	58	2

8. Total cases open during the month (Items 8a plus Item 8b; also Items 6 plus 7).....	59	2,866	60	6,952	61	9,612	62	5,314	63	5,200
a. Cases receiving cash grant (\$10 or more)	64	2,787	65	6,885	66	9,415	67	5,220	68	5,124
1) Children in Item 8a cases	69	7,139	70	12,833	71	16,231	72	11,642	73	12,574
2) Adults in Item 8a cases	74	4,103			75	7,746	76	4,282		
3) Total persons (Item 8a1 plus Item 8a2)	77	11,242	78	12,833	79	23,977	80	15,924	81	12,574
b. Other cases (zero grant cases, less than \$10 cases, etc.)	82	79	83	67	84	197	85	94	86	76
1) Children in Item 8b cases	87	186	88	108	89	320	90	195	91	199
2) Adults in Item 8b cases	92	113			93	173	94	78		
3) Total persons (Item 8b1 plus Item 8b2)	95	299	96	108	97	493	98	273	99	199

9. Cases discontinued during the month (Same as Item 1, CA 253 CW)	100	175	101	238	102	617	103	256	104	228
10. Cases deducted due to transfers to another program segment during the month (Same as Item 12, CA 253 CW)	105	51	106	28	107	129	108	126	109	27
11. Cases added due to transfers from another program segment during the month (Same as Item 13, CA 253 CW)	110	18	111	56	112	52	113	80	114	155
12. Cases open at the end of the month (Item 8 minus (Item 9 and Item 10) plus Item 11)	115	2,658	116	6,742	117	8,918	118	5,012	119	5,100

13. Cases open during the month (Item 13a plus Item 13b)	120	95	121	3,430		
a. Cases receiving cash grant (\$10 or more)	122	93	123	3,373		
1) Children in Item 13a cases	124	315	125	8,199		
b. Other cases (zero grant cases, less than \$10 cases, etc.)	126	2	127	57		
1) Children in Item 13b cases	128	7	129	146		

14. Cases open during the month (Item 14a plus Item 14b)	130	0	131	89	
a. Cases receiving cash grant (\$10 or more)	132	0	133	88	
1) Children in Item 14a cases	134	0	135	201	
b. Other cases (zero grant cases, less than \$10 cases, etc.)	136	0	137	1	
1) Children in Item 14b cases	138	0	139	3	

15. Cases open during the month (Item 15a plus Item 15b)	140	356		141	1,230		
a. Cases receiving cash grant (\$10 or more)	142	353		143	1,217		
1) Children in Item 15a cases	144	1,102		145	2,757		
b. Other cases (zero grant cases, less than \$10 cases, etc.)	146	3		147	13		
1) Children in Item 15b cases	148	8		149	35		

CONTACT PERSON	TELEPHONE	EXTENSION	FAX
TITLE/CLASSIFICATION	E-MAIL		DATE SUBMITTED

Figure 2.1.2.1 – CA 237 CW State Sheet

Note: No cosmetic changes are required for this SCR

2.1.3 Description of Change

1. Update the CA 237 CW SAR 7 discontinuance logic to capture SAR 7 discontinuances when the action is taken by the worker by the 6th calendar day after the end of the SAR 7 submit month.
 - a. The logic already counts cases where the program was discontinued by the SAR 7 discontinuance batch. This SAR 7 discontinuance batch runs the first business night after the report month and retroactive discontinuances are done by this batch on the second business night after the report month.
 - b. The update will now count cases that were discontinued by the SAR 7 discontinuance batch or discontinued by the worker for reasons due to SAR 7 within 6 calendar days following the end of the report month.

Note: Cases discontinued are counted on **Line 9 - Cases discontinued during the month** of the CA 237 CW. Line 9 is the same as **Line 1 - Total cases discontinued during the month** on the CA 253 report. These line items shall reconcile with each other.
 - c. A SAR 7 discontinuance done by the worker will be counted if it meets the following criteria:
 - i. The program was discontinued by a worker, i.e. the discontinuance was not done by batch
Tech Note: The logic will no longer need to check who the discontinuance was done by i.e. STAFF.LAST_NAME will no longer matter. If it was done for any of the SAR 7 reasons mentioned below then it does not matter if it was done by batch or a worker, it will get counted.
 - ii. The program status is 'Discontinued'
Tech Note: When pulling the final records for line 9, the logic checks for PGM_DETL.STAT_CODE = 'DS'
 - iii. The program was SAR 7 discontinued in the report month or by the 6th calendar day following the end of the report month.
 - For example, if the report month is 01/2025 the worker would have up until the 02/06/2025 at 6pm to get their SAR 7 discontinuances entered to be counted in the report for 01/2025. This is regardless of if the 6th calendar day is a Sunday or not. Holidays and Sundays are counted as calendar days for the 6 calendar day window.
 - In the case the SAR 7 discontinuance isn't completed by the 6th calendar day, the case will still be considered active at the end of the 01/2025 report month and is carried forward into the 02/2025 report caseload. The discontinuance would then be adjusted out of the 02/2025 report if the case remained discontinued as of the end of 02/2025.

- iv. The program was discontinued due to SAR 7 reasons. Such reasons include:

Code Number Identifier (CT73)	Short Decode Name
SB	No SAR7 for Prior Month
SC	SAR 7 Incomplete
SD	SAR 7 Not Received

Tech Note: The logic currently also includes codes which are no longer active in the system: '01', '02', '03'. These can be removed from the logic.

- d. These changes will not apply to the non-SAR 7 discontinuance logic in the report. The non-SAR 7 discontinuance logic will remain as is.
 - e. Please see the **Appendix** section **A** for examples of records that would be captured as SAR 7 discontinuances done by a worker.
2. Update the CA 237 CW logic to account for multiple applications scenarios:
- a. Scenario 1: Separate applications for the same case that is not yet active, that are approved for different effective months within the same report month.
 - i. If multiple distinct applications (having different application IDs) meet the criteria of an application approved in the same report month, only the application with the latest effective date that placed the application into the 'Approved' status is reported. Thus, we first evaluate the action date to determine when the approved application has added the case to the caseload, then evaluate the effective date of each approved application to determine which application is reported as having added the case to the caseload. In other words, we first check that the date the application was marked as 'Approved' is in the report month then evaluate the latest effective date of the 'Approved' status of the application to determine which application is reported in the report.
 - ii. For example – Application with an effective month equal to the report month vs application with an effective month for a prior (retro) month:

Report Month = 01/2025

- **Application 1** has an application date of 01/03/2025 and is marked as 'Approved' on 01/05/2025 for the current month of 01/2025 i.e. the 'Approved' status is effective 01/01/2025
- **Application 2** has an application date of 12/06/2024 and is marked as 'Approved' on 01/08/2025 for prior(retro) month 12/2024 for a one-month eligibility i.e. the 'Approved' status is effective 12/01/2024

- **Application 1** is reported in the report because it is the approval that went into effect at the latest date
 - **Application 1** Effective Month 01/2025 > **Application 2** Effective Month 12/2024
 - **Application 1** would get counted in line 4a: *Applications disposed of during the month – Applications approved* and line 7a: *Cases added during the month – Applications approved*
 - **Application 2** does not get reported in any line item in the 01/2025 report
 - Please see the **Appendix** section **B** for additional examples of applications that would be counted as approved if the case has multiple applications approved for different effective months and is not yet active
- b. Scenario 2: An application for a case that is already Active and approved for a prior (retro) effective month.
- i. In the scenario a case is already active in the report month and an application is approved in the report month for a prior (retro) effective month, this application will not be counted in the report month as an approved application under line 4a: *Applications disposed of during the month – Applications approved*.
 - ii. In other words, an approved application captured on line 4a: *Applications disposed of during the month – Applications approved* should not get counted when that case is included in the carried forward case count on line 6: *Cases carried forward from last month*.
 - The approved application would only be counted if meeting the criteria to be counted in line 4a: *Applications disposed of during the month – Applications approved* and in line 7a: *Cases added during the month - Applications approved* or line 7b: *Cases added during the month – Restorations approved*. This would mean the case was not already active in the report month and not counted in line 6: *Cases carried forward from last month* as the case would become active by the application approved in the report month.
 - iii. For example:
Report Month = 01/2025
 - **Case 1234567** was added to the caseload in 12/2024 as its **Application A** was approved in the 12/2024 report month making it active. This case gets captured in the line 6 carried forward count in the 01/2025 report as it was carried forward from the last report month of 12/2024. **Application A** for **Case 1234567** has application date 12/04/2024 and marked as 'Approved' on 12/06/2024 for the month of 12/2024, i.e. the 'Approved' status is effective 12/01/2024.

- **Application B** with application date 11/04/2024 is entered into the system as 'Pended' on 1/03/2025 effective 11/2024, i.e. the 'Pended' status is effective 11/01/2024. The application is then marked as 'Approved' on 01/06/2025 for the prior (retro) month of 11/2024, i.e. the 'Approved' status is effective 11/01/2024 for the already active case.
 - **Application B** is not reported in the 01/2025 report in any line item because the case was already active and **Application A** that was approved was already accounted for in the 12/2024 report. **Case 1234567** was added to the caseload in the 12/2024 report and accounted for as a carried forward case in the 01/2025 report.
 - Please see the **Appendix** section **C** for additional examples of applications that would not be counted as approved if the case has an application approved for a prior (retro) effective month and is already active.
3. Update the 2nd cut snapshot of data taken for PRMRSAWS2 database to be as of the 6th calendar day following the report month.
Note: The CA 237 CW along with the 2nd cut reports listed below in **section 2.1.3.4b** use the PRMRSAWS2 database for its source data.
 - a. This will be done to ensure the source data that is used in the CA 237 CW report will include the SAR 7 discontinuances that are done by the worker through the 6th calendar day following the report month (as per the update made in **section 2.1.3.1** above).
Note: Workers are recommended to have SAR 7 discontinuances logged in the system before 6pm on the 6th calendar day following the end of the report month to have this data included in the 2nd cut snapshot.
 4. Update the following 2nd cut reports to run on the 1st business day after the 2nd cut data snapshot is loaded into PRMRSAWS2. The reports should be available in the system by end of day on the 7th business day.
 - a. The reports to be updated include:
 - CA 237 CW
 - CA 237 CW Line 8 Backup Report
 - *CA 253
 - *CA 255
 - *CF 18
 - *CF 296
 - *CF 296 Line 6 Backup Report
 - *WINS 2

Note: Reports with an asterisk * mean no logic is being updated for these reports, only the scheduling jobs to align with the 2nd cut snapshot updates.
 - b. For example, using 02/2025 as the report *generation* month (when the report was run) for the report month of 01/2025:
 - i. The 2nd cut snapshot is taken of the production data as of the 6th calendar day, which is 02/06/2025. This data will be used to run 2nd cut reports.

- ii. The 2nd cut snapshot is loaded into the Oracle database, PRMRSAWS2, on 02/07/2025, with data as of 02/06/2025
- iii. The data gets ingested into AWS S3 on the 1st business day following the 2nd cut snapshot, 02/07/2025
- iv. Our 2nd cut report generation jobs run after the ingestion job on the same day, 02/07/2025.
- v. The report is generated and will be available in the system by end of day on the 2nd business day after the 6th calendar day following the report month, which would be 02/08/2025.

Note: Saturday is considered a business day in CalSAWS.

Tech Note: Associated sweep, RDS and Qlik jobs, related to the listed reports, which run on the 2nd cut batch schedule will also need to be updated to align with the update of the report availability to be by end of day on the 2nd business day after the 6th calendar day.

2.1.4 Report Location

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

2.1.5 Counties Impacted

All counties will be impacted.

2.1.6 Security Updates

- Security Rights

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

- Security Groups

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

2.1.7 Report Usage/Performance

No significant changes in reports usage or performance are expected.

2.2 CA 253

2.2.1 Overview

The CA 253 provides the number of CalWORKs cases discontinued from the cash grant program for Two Parent Families, Zero Parent Families, All Other Families, TANF Timed-Out, Safety Net, Fleeing Felon and Long-Term Sanction cases. The report includes reasons for discontinuance of these cases, and data on the movement of cases within the specific family segments in the CalWORKs program. This is a scheduled state report available monthly.

The CA 253 report and the CA 237 CW report reconcile via the following:

- Line 1 - *Total cases discontinued during the month* of the CA 253 report is to equal Line 9 - *Cases discontinued during the month* of the CA 237 CW
- Line 12 - *Total cases transferred to another program segment during the month* of the CA 253 report is to equal Line 10 - *Cases deducted due to transfers to another program segment during the month* of the CA 237 CW report
- Line 13 - *Total cases transferred from another program segment during the month* of the CA 253 report is to equal Line 11 - *Cases added due to transfers from another program segment during the month* of the CA 237 CW

With the updates made to the CA 237 CW to now also capture the SAR 7 discontinuances done by a worker by the 6th calendar day following the report month, the CA 253 report will also be updated to reconcile with the count of line 7a - *Cases discontinued due to SAR 7 noncompliance* on the CA 253 and the cases counted in line 9 of the CA 237 CW that were discontinued due to SAR 7 noncompliance.

2.2.2 CA 253 Mockup

COUNTY NAME San Bernardino		VERSION <input type="checkbox"/> INITIAL <input type="checkbox"/> REVISED		REPORT MONTH AND YEAR 01/2025			
PART A. REASONS FOR DISCONTINUANCES OF CASH GRANT		Two Parent Families (A)	Zero Parent Families (B)	All Other Families (C)	TANF Timed-Out (D)	LT Sanction/SN/FF (E)	
1. Total cases discontinued during the month (Sum of Items 2 through 11) (Same as Item 9, CA 237 CW)		175	238	617	256	228	
2. Cases with no eligible child		9	47	65	26	27	
3. Cases with children no longer deprived of support or care		0	0	0	0	0	
4. Cases with resources that exceed limits		0	0	0	0	0	
5. Cases with income that exceeds standards (Sum of Items 5a through 5f)		58	10	102	45	32	
a. Earnings increased		56	10	94	36	32	
b. Benefits or pensions increased		2	0	7	9	0	
c. Support from person inside home increased		0	0	1	0	0	
d. Support from person outside home increased		0	0	0	0	0	
e. Requirements reduced		0	0	0	0	0	
f. Timed-out adult and income ineligible		0	0	0	0	0	
6. Cases with client who moved and/or cannot be located		1	6	5	1	1	
7. Cases discontinued due to recipient initiative		58	37	266	70	38	
a. Cases discontinued due to SAR 7 noncompliance		41	7	154	37	16	
8. Cases excluded by law for reasons other than time limits and citizenship		40	125	148	93	114	
9. Cases transferred to another county		9	13	31	21	16	
10. Cases transferred to Kin-GAP Program		0	0	0	0	0	
11. Cases transferred to Foster Care program		0	0	0	0	0	
PART B. DISCONTINUANCES DUE TO PROGRAM SEGMENT TRANSFERS							
12. Total cases transferred to another program segment during the month (Same as Item 10, CA 237 CW)		51	28	129	126	27	
a. Cases transferred from Zero Parent to Two Parent Families		0					
b. Cases transferred from All Other to Two Parent Families		9					
c. Cases transferred from TANF Timed-Out to Two Parent Families		6					
d. Cases transferred from LT Sanction/SN/FF to Two Parent Families		3					
e. Cases transferred from Two Parent to Zero Parent Families			3				
f. Cases transferred from All Other to Zero Parent Families			39				
g. Cases transferred from TANF Timed-Out to Zero Parent Families			10				
h. Cases transferred from LT Sanction/SN/FF to Zero Parent Families			4				
i. Cases transferred from Two Parent to All Other Families				23			
j. Cases transferred from Zero Parent to All Other Families				19			
k. Cases transferred from TANF Timed-Out to All Other Families				1			
l. Cases transferred from LT Sanction/SN/FF to All Other Families				9			
m. Cases transferred from Two Parent to TANF Timed-Out Cases					5		
n. Cases transferred from Zero Parent to TANF Timed-Out Cases					5		
o. Cases transferred from All Other to TANF Timed-Out Cases					59		
p. Cases transferred from LT Sanction/SN/FF to TANF Timed-Out Cases					11		
q. Cases transferred from Two Parent to LT Sanction/SN/FF Cases						20	
r. Cases transferred from Zero Parent to LT Sanction/SN/FF Cases						4	
s. Cases transferred from All Other to LT Sanction/SN/FF Cases						22	
t. Cases transferred from TANF Timed-Out to LT Sanction/SN/FF Cases						109	
13. Total cases transferred from another program segment during the month (Same as Item 11, CA 237 CW)		18	56	52	80	155	
GENERAL COMMENTS							
REVISED REPORT EXPLANATION							
CONTACT PERSON		TELEPHONE		EXTENSION	FAX		
JOB TITLE/CLASSIFICATION		E-MAIL		DATE SUBMITTED			

Figure 2.2.2.1 – CA 253 State Sheet

Note: No cosmetic changes are required for this SCR

2.2.3 Description of Change

1. Update the CA 253 report to reconcile with the count of line 7a - Cases discontinued due to SAR 7 noncompliance on the CA 253 and the cases counted in line 9 of the CA 237 CW that were discontinued due to SAR 7 noncompliance. Line 7 of the CA 253 should also now be including SAR 7 discontinuances done by a worker by the 6th calendar day following the report month as outlined in the changes for **section 2.1.3.1** for the CA 237 CW.
 - a. The records on the CA 237 CW 'Line 9' sheet and CA 253 'Line 7' sheet that are discontinued due to SAR 7 noncompliance are those having column 'Discontinuance Reason' with the following values:
 - No SAR7 for Prior Month
 - SAR 7 Incomplete
 - SAR 7 Not Received
 - b. After filtering the sheets for these records, this is what is to reconcile between line 7a details of the CA 253 and line 9 details of the CA 237 CW for SAR 7 discontinuances due to noncompliance.

2.2.4 Report Location

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

2.2.5 Counties Impacted

All counties will be impacted.

2.2.6 Security Updates

1. Security Rights

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



2. Security Groups

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

2.2.7 Report Usage/Performance

No significant changes in reports usage or performance are expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	CA 237 CW	 CA 237 CW.xlsx
2	Reports	CA 253	 CA 253 CW.xlsx

4 APPENDIX

A. SAR 7 Discontinuances

This section includes examples of SAR 7 discontinuances completed by a worker within a 6-calendar day window that would be counted or not counted in line 9: Cases *discontinued during the month*

Example 1: Report Month = 01/2025

Last day for worker to complete the SAR 7 discontinuance within the 6-calendar day window (Sundays and holidays included) = 02/06/2025 recommended before 6pm

- The report is now using data from the 2nd cut snapshot captured as of the 6th calendar day which is 02/06/2025 for February.

Report Generation Date: 1st business day after 6th calendar day, this would be the evening of 02/07/2025

Scheduled Report Availability Date: 2nd business day after 6th calendar day - 02/08/2025

February 2025						
Su	M	T	W	Th	F	S
						1
2	3	4	5	6 *Last day for worker to complete SAR 7 discontinuances before 6pm	7 *Report generating	8 *Report is available in CalSAWS
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

#	Program Status	Program Status Reason	Program Status Begin Date	Effective Date	Program Status Created on Date	Program Status Created By Last name	Reported on Line 9 Y/N
1	Discontinued	SAR 7 Incomplete	02/02/2025	02/01/2025	02/02/2025	Smith	Y
2	Discontinued	SAR 7 Not Received	02/03/2025	02/01/2025	02/03/2025	Jones	Y
3	Discontinued	No SAR7 for Prior Month	02/06/2025	02/01/2025	02/06/2025 at 4:30pm, prior to the 2 nd cut snapshot	Worker	Y
4	Discontinued	SAR 7 Not Received	02/07/2025	02/01/2025	02/07/2025	Worker	N
5	Discontinued	SAR 7 Incomplete	02/01/2025	02/01/2025	02/01/2025	Batch	Y

Notes:

- #4 is not reported on Line 9 of the CA 237 CW because it was not discontinued by the 6th calendar day following the 01/2025 report month. Since this record did not make the 6th calendar day window, it will still be considered active at the end of the 01/2025 report month and is carried forward into the 02/2025 report caseload. The discontinuance would then be adjusted out of the 02/2025 report if the case remained discontinued as of the end of 02/2025.
- Although #5 was discontinued by 'Batch' and not a worker, it is still counted on Line 9 because it was discontinued on the first business day following the submission month and for reasons due to SAR 7. This is current functionality in the report logic and is remaining as is.

B. Separate applications for the same case that is not yet active, that are approved for different effective months within the same report month

This section provides additional examples of applications that would be counted as approved if the case is not yet active and has multiple applications approved for different effective months

Example 1: Application with an effective month equal to the report month vs application with an effective month for a prior (retro) month:

Report Month = 01/2025

App #	App Date	Approval Event Date	Effective Date of Approval Status	Reported on Line 4 Y/N	Reported on Line 7 Y/N
1	01/06/2025	01/07/2025	01/01/2025	Y	Y
2	12/09/2024	01/06/2025	12/01/2024	N	N

Notes:

- Both of these applications meet the criteria of an approved application that is added to the caseload in the report month but we can only count one application in this scenario, which is the application that will be reflected in future month eligibility and reporting.
- Application 1** is reported in the report because it is the approval that went into effect at the latest date.
 - Application 1** Effective Month 01/2025 > **Application 2** Effective Month 12/2024
- Application 1** would get counted in line 4a: *Applications disposed of during the month – Applications approved* and line 7a: *Cases added during the month – Applications approved*

Example 2: Application with an effective month equal to the report month vs application with an effective month for a future month:

Report Month = 01/2025

App #	App Date	Approval Event Date	Effective Date of Approval Status	Reported on Line 4 Y/N	Reported on Line 7 Y/N
1	01/30/2025	01/31/2025	02/01/2025	Y	Y
2	12/03/2024	01/06/2025	01/01/2025	N	N

Notes:

- Both of these applications meet the criteria of an approved application that is added to the caseload in the report month, but we can only count one application in this scenario, which is the application that will be reflected in future month eligibility and reporting.
- Application 1** is reported in the report because it is the approval that went into effect at the latest date.
 - Application 1** Effective Month 02/2025 > **Application 2** Effective Month 01/2025
- Application 1** would get counted in line 4a: *Applications disposed of during the month – Applications approved* and line 7a: *Cases added during the month – Applications approved*

Example 3: Application with an effective month for a prior (retro) month vs application with an effective month for a future month:

Report Month = 01/2025

App #	App Date	Approval Event Date	Effective Date of Approval Status	Reported on Line 4 Y/N	Reported on Line 7 Y/N
1	01/29/2025	01/31/2025	02/01/2025	Y	Y
2	12/04/2024	01/02/2025	12/01/2024	N	N

Notes:

- Both applications meet the criteria of an approved application that is added to the caseload in the report month, but we can only count one application in this scenario, which is the application that will be reflected in future month eligibility and reporting.
- Application 1** is reported in the report because it is the approval that went into effect at the latest date.
 - Application 1** Effective Month 02/2025 > **Application 2** Effective Month 12/2024
- Application 1** would get counted in line 4a: *Applications disposed of during the month – Applications approved* and line 7a: *Cases added during the month – Applications approved*

C. An application for a case that is already Active and approved for a prior (retro) effective month.

This section provides additional examples of applications that would not be counted as approved if the case is already active and has an application approved for a prior (retro) effective month.

Example 1: Application for a case that was already active in the prior report month and has a separate application approved in the report month with an effective month for a prior (retro) month:

Report Month = 01/2025

App #	App Date	Approval Event Date	Effective Date of Approval Status	Reported on Line 4 Y/N	Reported on Line 6 Y/N
1	12/02/2024	12/04/2024	12/01/2024	N	Y
2	11/05/2024	01/07/2025	11/01/2024	N	N

Notes:

- A case was added to the caseload in 12/2024 as its **Application 1** was approved in the 12/2024 report month making it active. This case gets captured in the line 6 carried forward count in the 01/2025 report as it was carried forward from the last report month of 12/2024. **Application 1** has application date 12/02/2024 and was marked as 'Approved' on 12/04/2024 for the month of 12/2024, i.e. the 'Approved' status is effective 12/01/2024.
- **Application 2** with application date 11/05/2024 is entered into the system as 'Pended' on 1/03/2025 effective 11/2024, i.e. the 'Pended' status is effective 11/01/2024. The application is then marked as 'Approved' on 01/07/2025 for the retro month of 11/2024, i.e. the 'Approved' status is effective 11/01/2024 for the already active case.
- **Application 2** is not reported in the report because the case was already active and **Application 1** that was approved was already accounted for in the 12/2024 report. The case was added to the caseload in the 12/2024 report and accounted for as a carried forward case in the 01/2025 report.

CalSAWS

California Statewide Automated Welfare System



CA-275534

Update CalFresh EDBC Usage and
Determination of Household Category

DOCUMENT APPROVAL HISTORY

Prepared By	Sridhar Mullapudi
Reviewed By	Richard Weeks, Norma Meza

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
10/15/2024	1.0	Initial Draft	Sridhar Mullapudi
03/31/2025	1.1	Added a note in recommendation 2.3, 2.4, and 2.5 to clarify the usage of public assistance indicator.	Sridhar Mullapudi

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CA-275534 – Update CalFresh EDBC Usage and Determination of Household Category

1 OVERVIEW

1.1 Current Design

1. Public assistance indicator is determined to be 'Yes' for CalFresh households if at least one person in the household is an active member in any one of the following programs:
 - a. CalWORKs (CT18_CW)
 - b. Immediate Need (CT18_IN)
 - c. Tribal TANF (CT18_TT)
 - d. TANF (CT18_TA)
 - e. SSI Only (CT18_SI)
 - f. SSP Only (CT18_SP)
 - g. SSI/SSP (CT18_SS)
 - h. General Assistance/General Relief (CT18_GA)
 - i. GA/GR Automated Solution (CT18_GR)
 - j. General Assistance (Managed) (CT18_GM)
 - k. General Assistance (Non-Managed) (CT18_GN)
 - l. GA/GR Immediate Need (CT18_GI)

This determination is stored as 'Public assistance Indicator' and is not displayed on the EDBC summary page with the implementation of SCR CA-223763. This indicator is used for eligibility and budgeting determination and for reporting purposes.

2. Household Category determination identifies the type of public assistance the household is receiving. The CalFresh household shall be determined to be one of the following categories:
 - a. PACF CalWORKs-Only
 - b. PACF Tribal TANF-Only
 - c. PACF SSI/SSP-Only
 - d. PACF GA/GR-Only
 - e. PACF Multiple
 - f. PACF Mixed
 - g. NACF
3. Public assistance indicator and Household Category is determined when running CalFresh EDBC, this determination is used various eligibility and budgeting determination such as CE, MCE and budgeting.

1.2 Requests

1. Refactor CalFresh EDBC to use household category determination to determine eligibility and budget determinations for a CalFresh household.
2. Update the public assistance indicator to be determined based on the household category determination when running CalFresh EDBC. This indicator is used for fiscal and reporting purposes.
3. Update CalFresh EDBC logic to determine household category when EDBC results in a denied or discontinued status.

1.3 Overview of Recommendations

1. Update EDBC logic to set the public assistance indicator value based on the Household category determination.
2. Update EDBC logic to use household category values for CalFresh eligibility determinations.
3. When overriding CF EDBC or running manual EDBC, update EDBC logic to set public assistance indicator to align with overridden household category value.
4. Update EDBC logic to set household category value when CalFresh program is denied or discontinued.
5. Update EDBC logic to use household category determination for CalFresh budgeting determinations.

1.4 Assumptions

1. CE/MCE determination logic remains unchanged with the implementation of this SCR.
2. Running CalFresh EDBC for any benefit month after the implementation of this SCR shall follow the household category and public assistance indicator determination as indicated in this SCR. EDBCs run prior to the implementation of this SCR shall remain unchanged.
3. CalFresh budgeting determination shall remain unchanged with the implementation of this SCR.
4. No changes to household category determination and the display of the household category on the EDBC summary page.
5. PACF Multiple shall continue to be evaluated as a CalFresh household receiving public assistance similar to the following household categories:
 - a. PACF CalWORKs-Only
 - b. PACF Tribal TANF-Only
 - c. PACF SSI/SSP-Only
 - d. PACF GA/GR-Only

2 RECOMMENDATIONS

2.1 Update Public Assistance Indicator Determination Logic

2.1.1 Overview

When running CalFresh EDBC set the public assistance indicator based on the household category determination.

2.1.2 Description of Changes

1. When running CalFresh EDBC, update public assistance indicator determination logic as follows:
 - a. If the household category determination is any of the following, public assistance indicator shall be set to 'Yes'
 - i. PACF CalWORKs-Only
 - ii. PACF Tribal TANF-Only
 - iii. PACF SSI/SSP-Only
 - iv. PACF GA/GR-Only
 - v. PACF Multiple
 - vi. PACF Mixed
 - b. If the household category determination is any of the following, public assistance indicator shall be set to 'No'
 - i. NACF

Technical Note: Create a new public assistance determination method that shall only be used to save the above public assistance indicator value determination. **This indicator value shall be used for Fiscal and reporting purposes** and shall not be used for EDBC determination. Recommendation 2.2 outlines the usage of Household category for EDBC to determine if a household is on public assistance used in eligibility and budgeting determinations.

2.1.3 Programs Impacted

CalFresh

2.1.4 Performance Impacts

None

2.2 Refactor CalFresh Logic to Use Household Category for EDBC Public Assistance Determination

2.2.1 Overview

Refactor the current functionality to use household category determination when determining CalFresh eligibility during CalFresh EDBC run.

2.2.2 Description of Changes

1. Update CalFresh EDBC logic to not use the 'public assistance indicator' value for CalFresh EDBC determination. CalFresh EDBC shall use household category determination for eligibility and budgeting determinations.
 - a. CalFresh EDBC shall consider the household is on public assistance when household category value is any one of the following:
 - i. PACF CalWORKs-Only
 - ii. PACF Tribal TANF-Only
 - iii. PACF SSI/SSP-Only
 - iv. PACF GA/GR-Only
 - v. PACF Multiple
 - b. CalFresh EDBC shall NOT consider the household to be on public assistance when household category value is any one of the following:
 - i. PACF Mixed
 - ii. NACF

2.2.3 Programs Impacted

CalFresh

2.2.4 Performance Impacts

None

2.3 Update Public Assistance Indicator Determination When Overriding or Running a Manual EDBC.

2.3.1 Overview

Update CalFresh EDBC logic to set public assistance indicator value when overriding or when running a manual EDBC and override/set household category value.

2.3.2 Description of Changes

1. When overriding household category for a CalFresh EDBC or when running manual CalFresh EDBC, update public assistance indicator value based on the Household category value set by the user.
 - a. If the household category set by the user is any of the following, public assistance indicator shall be set to 'Yes'
 - i. PACF CalWORKs-Only
 - ii. PACF Tribal TANF-Only
 - iii. PACF SSI/SSP-Only
 - iv. PACF GA/GR-Only
 - v. PACF Multiple
 - vi. PACF Mixed
 - b. If the household category set by the user is any of the following, public assistance indicator shall be set to 'No'
 - i. NACF

Note: Public assistance indicator set in this recommendation shall be used for Fiscal and reporting purposes and shall not be used for EDBC determination. EDBC shall use the household category for eligibility and budgeting determinations as outlined in recommendation 2.2.

Technical Note: when overriding program configuration values such as household category or categorical eligibility, current functionality stores the overridden value in the database. This functionality shall continue to apply for the public assistance indicator and household category values.

Example1:

Running CalFresh EDBC determined the HH to be 'PACF CalWORKs' and public assistance indicator to be 'Yes'. If the user chooses to override the household category determination to be 'NACF', when saving the overridden value public assistance indicator shall also be overridden to 'No'. The value 'NACF' shall be stored in 'HH_CAT' column and 'PACF CalWORKs' shall be stored in 'Overrd_HH_Cat' column for tracking purposes on FS_EDBC table. Similarly, public assistance indicator value 'No' shall be stored in 'PUBLIC_ASSIST_IND' column and 'Yes' shall be stored in 'OVRRD_PUBLIC_ASST_IND' column in the EDBC table.

Example2:

Running CalFresh EDBC determined the HH to be 'PACF CalWORKs' and public assistance indicator to be 'Yes'. If the user chooses to override the household category determination to be 'PACF Mixed', when saving the overridden value public assistance indicator shall remain 'Yes'. The value 'PACF Mixed' shall be stored in 'HH_CAT' column and 'PACF CalWORKs' shall be stored in 'Overrd_HH_Cat' column for tracking purposes on FS_EDBC table.

2.3.3 Programs Impacted

CalFresh

2.3.4 Performance Impacts

None

2.4 Update Public Assistance Indicator and Household Category Determination Logic When CalFresh is Denied or Discontinued

2.4.1 Overview

When running CalFresh EDBC and the EDBC results in a denied or discontinued, determine household category for the closed program and update the public assistance indicator to follow household category determination.

2.4.2 Description of Changes

1. Update CalFresh EDBC logic to determine household category value when the EDBC determines the household to be denied or discontinued based on the role and status as effective prior to the EDBC run.
2. Update public assistance indicator determination logic when CalFresh EDBC is denied or discontinued to follow Household category determination as follows:
 - a. If the household category determination is any of the following, public assistance indicator shall be set to 'Yes'
 - i. PACF CalWORKs-Only
 - ii. PACF Tribal TANF-Only
 - iii. PACF SSI/SSP-Only
 - iv. PACF GA/GR-Only
 - v. PACF Multiple
 - vi. PACF Mixed
 - b. If the household category determination is any of the following, public assistance indicator shall be set to 'No'
 - i. NACF

Note: Public assistance indicator set in this recommendation shall be used for Fiscal and reporting purposes and shall not be used for EDBC determination. EDBC shall use the household category for eligibility and budgeting determinations as outlined in recommendation 2.2.

2.4.3 Programs Impacted

CalFresh

2.4.4 Performance Impacts

None.

2.5 Update Budget Level Categorical Eligibility Determination

2.5.1 Overview

When running CalFresh EDBC, categorical eligibility is determined at EDBC level to display on the EDBC and at the budget level for financial eligibility

determination. Update budget level categorical eligibility determination to use household category for eligibility determination.

2.5.2 Description of Changes

1. Update categorical eligibility determination at the budget level to use household category to determine CE eligibility as follows:
 - a. Household shall be considered a public assistance household if household category value is any of the following:
 1. PACF CalWORKs-Only
 2. PACF Tribal TANF-Only
 3. PACF SSI/SSP-Only
 4. PACF GA/GR-Only
 5. PACF Multiple
 - b. Household shall **not** be considered as CE if household category value is any of the following:
 1. PACF Mixed
 2. NACF

Note: Public assistance indicator set in this recommendation shall be used for Fiscal and reporting purposes and shall not be used for EDBC determination. EDBC shall use the household category for eligibility and budgeting determinations as outlined in recommendation 2.2.

2.5.3 Programs Impacted

CalFresh

2.5.4 Performance Impacts

None

2.6 Automated Regression Test - Update Household Category Scripts

2.6.1 Overview

Update existing automated regression test scripts that verify the "Household Category" value displayed on the CalFresh EDBC Summary page to also verify the correct "Public Assistance Indicator" value.

2.6.2 Description of Change

1. Update all existing regression scripts that verify the "Household Category" value on the CalFresh EDBC Summary page to verify both the "Household Category" and "Public Assistance Indicator" values.
 - a. Estimated script count: 12

CalSAWS

California Statewide Automated Welfare System



CA-275918

IEVS Automated Action Program Evaluation
Enhancement

DOCUMENT APPROVAL HISTORY

Prepared By

Vallari Bathala

Reviewed By

Justin Dobbs, Sarah Rich, Dymas Pena,
Carlos Albances, John Pratt

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

01/27/2025

1.0

Initial Revision

Vallari Bathala

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CA- 275918 – IEVS Automated Action Program Evaluation Enhancement

1 OVERVIEW

This design describes the details of expanding the IEVS Automated Action Task creation trigger condition to include Ineligible, Pending and Closed program statuses.

1.1 Current Design

The IEVS Automated Actions referenced in the Appendix require a valid program to be available before a resulting Task can be created. A program is considered valid if it is CalWORKs, CalFresh, Medi-Cal, RCA, CAPI or Foster Care and the program is Active with a worker assigned. If a valid program is not available, a Task is not processed.

1.2 Requests

1. Modify the IEVS Automated Action valid program determination logic to be less restrictive.

1.3 Overview of Recommendations

1. Update the IEVS Automated Action valid program determination to include additional program statuses.

1.4 Assumptions

1. Existing configurations to IEVS Automated Actions will not be impacted.

2 RECOMMENDATIONS

2.1 IEVS Automated Action

2.1.1 Overview

This section outlines the modifications to the IEVS Automated Action processing logic.

2.1.2 Description of Changes

1. Update the processing logic of the Automated Actions referenced in the [6. Appendix](#) to retrieve the CalWORKs, CalFresh, GA/GR, CAPI, RCA and Medi-Cal programs. If there are multiple programs that meet these criteria, apply the following program hierarchy for the Active programs:
 - a. CalWORKs
 - b. CalFresh
 - c. GA/GR
 - d. CAPI
 - e. RCA
 - f. Medi-Cal

If there are no Active programs that meet the criteria, then apply the program hierarchy to the non-Active programs.

Note: To align with the current IEVS program hierarchy, Foster Care will no longer be considered as part of the Task program hierarchy when evaluating for Task assignments.

2.1.3 Page Validations

N/A

2.1.4 Page Location

Automated Action Detail Page:

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

None.

2.1.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.13	<p>CalSAWS shall include the ability to automate tracking and inter- and intra-departmental communications for cases that are referred to other COUNTY-specified Users in specialized administrative units, including:</p> <ul style="list-style-type: none">a. Hearings;b. Quality control;c. GAIN;d. Welfare fraud;e. GROW; andf. SSI advocacy.	<ol style="list-style-type: none">1. Update the IEVS Automated Actions trigger conditions to include 'Ineligible', 'Pending', and 'Closed' program statuses when creating Tasks.

5 OUTREACH

N/A

6 APPENDIX

The following is a list of IEVS Automated Actions reference which create IEVS Tasks:

	Automated Action Name
1	IEVS Report: New Earnings Clearance Report
2	IEVS Report: New Fleeing Felon Report
3	IEVS Report: New Hire Report
4	IEVS Report: New PVS Match
5	IEVS Report: New Prisoner Match

Note: Since the IFDS abstracts are filtered by dollar amount, the system applies 1 of 2 Automated Actions depending on the amount:

1. The IEVS Report: IFDS Match Under 2500 Automated Action runs for abstracts with a dollar amount less than 2500
2. IEVS Report: New Earnings Clearance Report Automated Action runs for abstracts with a dollar amount 2500 or greater

The IEVS Report: IFDS Match Under 2500 already evaluates all program statuses and uses the updated hierarchy. Therefore, this Automated Action will not be impacted by the change outlined in this enhancement.



California Statewide Automated Welfare System

Design

CA-279665

Update M44-350K EBT Replacement Denial to 6-24 Version

DOCUMENT APPROVAL HISTORY

Prepared By

Ramon Villarreal-Leal

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
2/17/25	1.0	Draft Design	Ramon Villarreal-Leal
03/12/25	2.0	Updates to include Automated Regression testing	Ramon Villarreal-Leal
03/14/2025	3.0	Adding Fiscal Requirements	Eric Wu

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CA-279665 – Update M44-350K EBT Replacement Denial to 6-24 Version

1 OVERVIEW

This effort is to update M44-350K EBT Replacement Denial to the latest (06/24) version.

1.1 Current Design

The system generates the M44-350K (12/23) EBT Replacement Denial NOA in English and all threshold languages. The form generates as a pop-up from the EBT Theft Detail page via a "Generate M44-350K Form" button that is only displayed when the status of the EBT Theft Detail page is "Denied." It is also available in the template repository.

The denial reasons on the M44-350K are mapped to the denial reasons listed in the EBT Theft Detail page.

1.2 Requests

1. Update M44-350K to the latest (06/24) version.
2. Update the EBT Theft Detail page to match the updated M44-350K denial reasons.

1.3 Overview of Recommendations

1. Update EBT Theft Detail page's Edit/Create mode by removing obsoleted Denial Reasons (not in the latest M44-350K version).
2. Update M44-350K to the latest (06/24) version.
3. Perform onetime DCR to update the obsoleted Denial Reasons marked as 'Y' to 'N' for pending EBT Theft Detail records. Provide Counties a list of impacted records to review.

1.4 Assumptions

1. All existing functionality of these forms are not being updated unless specified by the recommendations section of this design.

2 RECOMMENDATIONS

2.1 Fiscal – EBT Theft Detail Page

2.1.1 Overview

This SCR will remove below Denial Reasons in Edit/Create mode.

1. Retroactive claim for benefits stolen before 10/01/2022 and after 11/30/2023
2. Retroactive claim submitted after 2/29/2024

Above reasons will remain visible in view mode for the purposes of reviewing historic records. However, users should not select or modify them going forward.

2.1.2 EBT Theft Detail Mockup

Denial Reasons	
<input type="checkbox"/> Not provide a good reason	<input type="checkbox"/> County determines no good reason
<input type="checkbox"/> Electronic theft did not happen	<input type="checkbox"/> Give EBT card/PIN to someone
<input type="checkbox"/> Benefits were already replaced	<input type="checkbox"/> Ask for replacement more than 90 days after the theft
<input type="checkbox"/> EBT 2259 more than 90 days after the theft	<input type="checkbox"/> EBT card was lost/stolen
<input type="checkbox"/> Already replaced twice within the current Federal Fiscal Year	<input type="checkbox"/> Request to replace SNB benefits
<input type="checkbox"/> Request to replace TNB benefits	

Figure 2.1.1 – Edit/Create Mode

Denial Reasons	
Not provide a good reason	County determines no good reason
Electronic theft did not happen	Give EBT card/PIN to someone
Benefits were already replaced	Ask for replacement more than 90 days after the theft
EBT 2259 more than 90 days after the theft	EBT card was lost/stolen
Already replaced twice within the current Federal Fiscal Year	Retroactive claim for benefits stolen before 10/01/2022 and after 11/30/2023
Retroactive claim submitted after 2/29/2024	Request to replace SNB benefits
Request to replace TNB benefits	

Figure 2.1.2 – View Mode

2.1.3 Description of Changes

1. Update the page to remove below Denial Reasons in Edit/Create mode. Please see Figure 2.1.1.
 - a. Retroactive claim for benefits stolen before 10/01/2022 and after 11/30/2023
 - b. Retroactive claim submitted after 2/29/2024

Above reasons will continue be visible in View mode. Please see Figure 2.1.2.

2. Below Denial Reasons will be displayed on EBT Replacement Denial NOA as 'You requested the replacement of benefits for the Supplemental Nutrition Benefit (SNB) or Transitional Nutrition Benefit (TNB) program.' when generated. Please see section 2.2 for more details.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: EBT Theft List**

2.1.5 Security Updates

No Changes

2.1.6 Page Mapping

No Changes

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

No Changes

2.2 Update M44-350K EBT Replacement Denial to 6/24 version

2.2.1 Overview

Update M44-350K EBT Replacement Denial to 6/24 version

State Form: M44-350K (6/24)

Current Programs: CAPI, Medi-Cal, General Assistance, RCA, CalFresh, Welfare-to-Work, REP, Cal-Learn, CalWORKS

Current Attached Forms: NA BACK 9

Current Forms Category: NOA

Current Template Repository Visibility: All Counties

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

2.2.2 Form/NOA Verbiage

Update M44-350K XDP

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

Form Mockups/Examples: See Supporting Documents #1

Existing Text	Updated Text	Location in Document
Blank	You requested the replacement of benefits for the Supplemental Nutrition Benefit (SNB) or	Left Column New Checkbox 6

	Transitional Nutrition Benefit (TNB) program.	Move the rest of the checkboxes down 1.
You asked for the replacement of benefits more than 90 days after the date of the electronic theft.	You requested the replacement of benefits more than 90 days after the date of the electronic theft.	Left Column New Checkbox 7
You requested retroactive reimbursements for benefits stolen before October 1 st , 2022 and after November 30, 2023.	Blank	Removed
You submitted your claim for retroactive reimbursement after February 28 th , 2024	Blank	Removed

2.2.3 Form/NOA Variable Population

The M44-350K will have the following variable population updates:

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository Population	Population with Form Generation
DENIAL_REASON6 SNB/TNB Checkbox	Checked when either the "Request to replace SNB benefits" or "Request to replace TNB benefits" denial reasons are selected from the EBT Theft Detail page.	Checkbox checked with an 'X'	Yes* / Checkbox	Yes	Yes

With the addition of the new Checkbox 6 with denial reason "You requested the replacement of benefits for the Supplemental Nutrition Benefit (SNB) or Transitional Nutrition Benefit (TNB) program." All other variable population logic for the succeeding denial reasons are shifted down 1 value.

2.2.4 Form/NOA Generation Conditions

There are no changes to this section.

2.3 Fiscal – DCR to Remove Denial Reasons

2.3.1 Overview

The DCR will deselect the below Denial Reasons for pending EBT Theft Detail records.

1. Retroactive claim for benefits stolen before 10/01/2022 and after 11/30/2023
2. Retroactive claim submitted after 2/29/2024

2.3.2 Description of Change

1. Set Denial Reasons listed above to 'No' when the following conditions are met:
 - a. EBT Theft Detail record is in pending status.
 - b. The listed Denial Reasons have the value of 'Yes'

2.3.3 Estimated Number of Records Impacted/Performance

15

2.4 Automated Regression Test

2.4.1 Overview

Update existing automated regression test scripts to no longer reference the removed Denial Reason checkboxes on the EBT Theft Detail page. Regression test posting of the M44-350K document to the Self-Service Portal.

2.4.2 Description of Change

1. Update the "CF - EBT Theft" regression script to remove references to the "Retroactive claim for benefits stolen before 10/01/2022 and after 11/30/2023" and "Retroactive claim submitted after 2/29/2024" checkboxes on the EBT Theft Detail page.
Technical Note: References to the editable checkboxes will also be removed from the mapping file for this page.
2. Perform regression testing to confirm that a generated and saved M44-350K document can be posted to the Self-Service Portal.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	NOAs	M44-350K form mockup	M44-350K_EN.pdf

4 APPENDIX

Exhibit A

1. Form Print/Mailing Options for M44-350K

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

Mailing Options:

Mail-To (Recipient): Customer name selected from dropdown in the document parameters page when generated from the Template Repository. When generated from the EBT Theft Detail page, mail to the person displayed on the page.

Mailed From (Return): Sending Office

Mail-back-to Address: None

Outgoing Envelope Type: Standard mail

Return Envelope Type: None

Additional Options:

Special Paper Stock: No

Enclosures: None

Electronic Signature: No

Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): Yes

5 OUTREACH

5.1 Lists

Provide a list of EBT Theft Detail records that are updated by the DCR (requirement 2.3).

List Name: EBT Theft Remove Obsolete Denial Reasons by DCR

List Criteria: Please see requirement 2.3.

Standard Columns:

- County
- Case Number
- EBT Theft Detail ID

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-279665

CalSAWS

California Statewide Automated Welfare System



CA-281190

Add Reassignment Template to Task Upload

DOCUMENT APPROVAL HISTORY

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Vallari Bathala

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CA-281190 – Add Reassignment Template to Task Upload

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to allow mass reassignment of Tasks via the Task Upload framework.

1.1 Current Design

Within the CalSAWS System, the Task Pop-Up: Task Search page allows more than one Task to be reassigned simultaneously. The page allows one or more Tasks to be selected and then processed with one of the following actions to reassign Tasks or remove assignments from Tasks:

- Assign to Me
- Assign to Program Worker
- Assign to Position
- Assign to Bank
- Unassign Position
- Unassign Bank

This processing is limited to the maximum number of Tasks that are displayed on the page.

The Task Upload functionality provides a framework to upload and process an action on up to 10 thousand Tasks. This functionality only supports Task creation and Task closure; it does not provide functionality to reassign Tasks.

1.2 Requests

1. Modify the Task Upload functionality to incorporate Task reassignment.
2. Modify CalSAWS Task Management pages as necessary to support the Task Upload modifications.

1.3 Overview of Recommendations

1. Incorporate a “Reassignment” template to the Task Upload pages and processing framework that will allow counties to upload up to 10 thousand Tasks to be reassigned in mass.

1.4 Assumptions

1. The Task Upload List will reflect the new “Reassignment” Template Type automatically without modification.

2 RECOMMENDATIONS

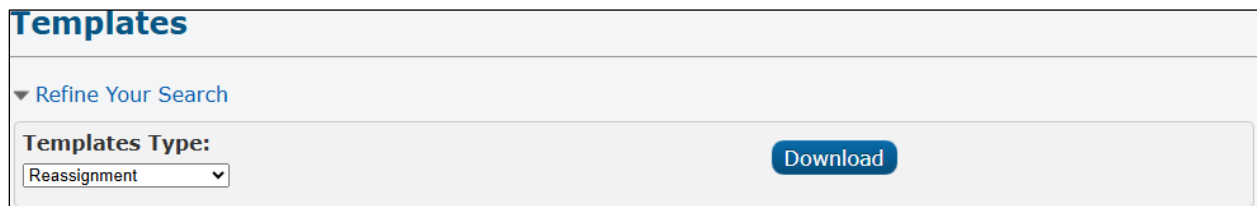
This section will outline recommendations to introduce Task mass reassignment functionality to the CalSAWS System.

2.1 Task Upload Pop-Up: Templates Page

2.1.1 Overview

The Templates page has a dedicated tab in the Task Upload Pop-Up window that will allow users to download Reassignment template.

2.1.2 Task Upload Pop-Up: Templates Mockup



The mockup shows a header with the title "Templates". Below it is a section titled "Refine Your Search". Under this section, there is a label "Templates Type:" followed by a dropdown menu currently showing "Reassignment". To the right of the dropdown is a blue button labeled "Download".

Figure 2.1.2 – Templates Page

2.1.3 Description of Changes

1. Templates Type – Add a “Reassignment” template to the dropdown menu that can be downloaded to be used for a Task Upload instruction. See Section 2.5 for the specifics of the Reassignment template.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload
 - Select the Templates tab at the top of the Task Upload Pop-Up page.

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

None.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Task Upload: Reassignment Templates Mockup

2.2.1 Overview

This section defines a new Task Upload template to facilitate mass Task reassignment.

2.2.2 Task Upload Pop-Up: Templates Mockup

Task Upload									
Reassignment									
Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker
12345678	1234567	CalWORKs	Intake		01/01/2025	Yes			
12345679	1234568				01/02/2025		000A800001		
12345680	1234569	CalFresh	ABAWD			Yes			
12345681	1234570		Time Limits		01/08/2025			008B12340BKL	
12345682	1234571		QR7 Received		02/01/2025				Yes
12345684	1234573		Intake		02/02/2025				Yes

Figure 2.2.2-1 – Reassignment Template

<h1>Instructions</h1> <p>Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.</p> <p>When providing a Case Number attribute for a Task in template, the following fields are required:</p> <ul style="list-style-type: none"> a. Task ID b. Case Number c. Assign to Program Worker <ul style="list-style-type: none"> or Both Worker ID and Bank ID or Remove Assigned Worker or Remove Assigned Bank <p>When NOT providing a Case Number attribute for a Task in template, the following fields are required:</p> <ul style="list-style-type: none"> a. Task ID b. Task Type c. Task Sub-Type (If applicable) d. Due Date e. Assign to Program Worker <ul style="list-style-type: none"> or Both Worker ID and Bank ID or Remove Assigned Worker or Remove Assigned Bank 		
Column	Required	Instructions
Task ID	Yes	Enter the Task ID of the Task. Task ID can be found on the Task Detail page and on the Task Export list.
Case Number	No	Enter a 7 digit CalSAWS Case Number that is valid for the county and Task ID.
Program	No	This field is optional and only serves as a reference data point in the template.
Task Type	No	This field is only required when a Case Number value is not provided. If a Case Number is provided, this field only serves as a reference data point in the template.
Task Sub-Type	No	This field is only required when a Case Number value is not provided, and a Task Sub-Type is applicable for the Task. If a Case Number is provided, this field only serves as a reference data point in the template.
Due Date	No	This field is only required when a Case Number value is not provided. If required, enter the Due Date of the Task formatted as "mm/dd/yyyy". If a Case Number is provided, this field only serves as a reference data point in the template.
Assign to Program Worker	No	This field is only required when reassigning Tasks to Program Worker. The options are: Yes
Worker ID	No	This field is only required when reassigning to a specific Worker.
Bank ID	No	This field is only required when reassigning to a specific Bank.
Remove Assigned Worker	No	This field is only required when removing a Worker already assigned to a Task. The options are: Yes
Remove Assigned Bank	No	This field is only required when removing a Bank already assigned to a Task. The options are: Yes

Figure 2.2.2-1 – Reassignment Template – Instructions Sheet Mockup

2.2.3 Description of Changes

1. This template contains the basic information necessary to reassign Tasks. The Template will also include an "Instructions" sheet that will contain general instructions for each field that the User may reference during data entry.

- a. Add the following basic instructions:
- Do not enter any more than 10,000 rows of information in the "Tasks" worksheet. Only the first 10,000 rows will be processed.
- When providing a Case Number attribute for a Task in template, the following fields are required:
- a. Task ID
 - b. Case Number
 - c. Assign to Program Worker
 - or
 - Both Worker ID and Bank ID
 - or
 - Remove Assigned Worker or Remove Assigned Bank

When NOT providing a Case Number attribute for a Task in template, the following fields are required:

- a. Task ID
 - b. Task Type
 - c. Task Sub-Type (If applicable)
 - d. Due Date
 - e. Assign to Program Worker
 - or
 - Both Worker ID and Bank ID
 - or
 - Remove Assigned Worker or Remove Assigned Bank
- b. Add the following column specific instructions:

Column	Required	Instructions
Task ID	Yes	Enter the Task ID of the Task. Task ID can be found on the Task Detail page and on the Task Export list.
Case Number	No	Enter a 7 digit CalSAWS Case Number that is valid for the county and Task ID.
Program	No	This field is optional and only serves as a reference data point in the template.
Task Type	No	This field is only required when a Case Number value is not provided. If a Case Number is provided, this field only serves as a reference data point in the template.

Column	Required	Instructions
Task Sub-Type	No	This field is only required when a Case Number value is not provided, and a Task Sub-Type is applicable for the Task. If a Case Number is provided, this field only serves as a reference data point in the template.
Due Date	No	This field is only required when a Case Number value is not provided. If required, enter the Due Date of the Task formatted as "mm/dd/yyyy". If a Case Number is provided, this field only serves as a reference data point in the template.
Assign to Program Worker	No	Enter a Yes to assign the Task to the Task program worker.
Worker ID	No	Enter a specific Worker ID to assign the Task to.
Bank ID	No	This field is only required when reassigning to a specific Bank.
Remove Assigned Worker	No	Enter a Yes to remove an assigned Worker from the Task.
Remove Assigned Bank	No	Enter a Yes to remove an assigned Bank from the Task.

2. The "Reassignment" template "Tasks" sheet will contain the following columns:

Column	Required	Definition
Task ID	Yes	The Task ID unique identifier for the Task.
Case Number	No	The 7digit Case Number of the Case that the Task is associated to. If Case Number is provided, one or more of the following fields are required: <ul style="list-style-type: none"> ▪ Assign to Program Worker ▪ Worker ID ▪ Bank ID ▪ Remove Assigned Worker ▪ Remove Assigned Bank

		<p>If Case Number is NOT provided, the following fields are required</p> <ul style="list-style-type: none"> ▪ Task Type ▪ Task Sub-Type (if applicable) ▪ Due Date <p>AND one or more of the following fields are required:</p> <ul style="list-style-type: none"> ▪ Assign to Program Worker ▪ Worker ID ▪ Bank ID ▪ Remove Assigned Worker ▪ Remove Assigned Bank
Program	No	The Program associated to the Task. This attribute serves as a reference data point in the template for the User. There are no format restrictions to this field.
Task Type	No	<p>The Name of the Task Type that the Task is associated to.</p> <p>If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification.</p> <p>If Case Number is NOT provided, the preview processing will validate that the Task Type is valid for the provided Task ID.</p>
Task Sub-Type	No	<p>The Name of the Task Sub-Type that the Task is associated to (if applicable).</p> <p>If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification.</p> <p>If Case Number is NOT provided and this field contains a value, the preview processing will validate that the Task Sub-Type is valid for the provided Task ID.</p>

Due Date	No	The Due Date of the Task. If Case Number is provided, this attribute serves as a reference data point in the template for the User, it is not used as part of the preview processing/Task identification. If Case Number is NOT provided, the preview processing will validate that the Due Date is valid for the provided Task ID.
Assign to Program Worker	No	When set to "Yes" the processing will assign the Task to the same Worker assigned to the Task Program.
Worker ID	No	A specific Worker ID to assign the Task to.
Bank ID	No	A specific Bank ID to assign the Task to.
Remove Assigned Worker	No	When set to "Yes", the processing will remove the Worker ID currently assigned to the Task. It is required that the Task have a valid Bank ID assignment remaining.
Remove Assigned Bank	No	When set to "Yes", the processing will remove the Bank ID currently assigned to the Task. It is required that the Task have a valid Worker ID assignment remaining.

2.2.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

None.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Task Upload Detail Page – Reassignment Upload - Status New

2.3.1 Overview

This section outlines modifications to the Task Upload Detail page to allow a user to create a new Reassignment Upload or View/Edit Reassignment Uploads.

2.3.2 Task Upload Detail Page – Reassignment Upload - Status New Mockup

The mockup shows a form titled "Task Upload Detail". At the top right are three buttons: "Save And Generate Preview", "Save and Return", and "Cancel". Below the title bar is a section "Task Upload Information". It contains several fields: "Name:" with a text input containing "Task Reassignment Templa"; "Status:" with a dropdown set to "New"; "Templates Type:" with a dropdown set to "Reassignment"; "File Name:" with a text input containing "Reassignment Template.xlsx" and a "Remove" button; "Created By:" with a text input containing "Vallari Bathala"; and "Updated On:" with a text input containing "11/22/2024". There is also a "Notes:" section with a large text area. At the bottom right are three buttons: "Save And Generate Preview", "Save and Return", and "Cancel".

Figure 2.3.2-1 – Task Upload Detail Page – Reassignment Template - Create Mode

The mockup shows the same form as Figure 2.3.2-1, but in "View Mode". At the top right are two buttons: "Edit" and "Close". The "Task Upload Information" section now displays the data as read-only. The "Name:" field contains "Task Reassignment Template". The "Status:" field contains "New". The "Templates Type:" field contains "Reassignment". The "File Name:" field contains "Reassignment Template.xlsx". The "Created By:" field contains "Vallari Bathala". The "Updated On:" field contains "11/22/2024". The "Notes:" section contains the text "Task reassignments for November". At the bottom right are two buttons: "Edit" and "Close".

Figure 2.3.2-2 – Task Upload Detail Page – Reassignment Template – View Mode

Task Upload Detail

* - Indicates required fields

Save and ReturnCancel

Task Upload Information

Name: *

Task Reassignment Template

Status:

New

Templates Type: *

Reassignment

File Name:

Reassignment Template.xlsx

Created By:

Vallari Bathala

Updated On:

11/22/2024

Notes:

Task reassignments for November

Save and ReturnCancel

Figure 2.3.2-3 – Task Upload Detail Page – Reassignment Template – Edit Mode

2.3.3 Description of Changes

Task Upload Information

1. Template Type – Add the “Reassignment” template to the dropdown menu.

2.3.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

None.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Task Upload Detail Page – Reassignment Upload – Preview Processing

2.4.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload of the “Reassignment” template is “Preview Processing”.

2.4.2 Task Upload Detail Page – Reassignment Upload - Status Preview Processing Mockup

Task Upload Detail

*- Indicates required fields

Close

Task Upload Information

Name: *
Task Reassignment Template

Templates Type: *
Reassignment

Created By:
Vallari Bathala

Notes:
Task reassignments for November

Status:
Preview Processing

File Name:
Reassignment Template.xlsx

Updated On:
11/22/2024

Close

Figure 2.4.2 – Task Upload Detail Page – Reassignment Preview Processing - View Mode

2.4.3 Description of Changes

The Status of “Preview Processing” indicates that the “Generate Preview” or “Save and Generate Preview” button was selected when the Status was “New” to run initial preview processing on the Reassignment file uploaded for the Task Upload. The page is only available in View mode when the Task Upload is in this Status.

2.4.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Accessibility

None.

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 Task Upload Detail Page – Reassignment Upload – Preview Complete

2.5.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload with a Template Type of “Reassignment” is “Preview Complete”.

2.5.2 Task Upload Detail Page – Reassignment Upload - Status Preview Complete

The screenshot displays the 'Task Upload Detail' page in 'View Mode'. At the top, there is a header bar with the title 'Task Upload Detail' and two buttons: 'Edit' and 'Close'. Below the header, a red asterisk icon indicates required fields. The main content area is divided into two sections: 'Task Upload Information' and 'Preview Information'.

Task Upload Information

Name: *	Status:
Task Reassignment Template	Preview Complete
Templates Type: *	File Name:
Reassignment	Reassignment Template.xlsx
Created By:	Updated On:
Vallari Bathala	11/22/2024
Notes:	
Task reassignments for November	

Preview Information

Value	Number of Tasks
Tasks without Errors	5
Tasks with Errors	1
Total Tasks	6

At the bottom right of the 'Preview Information' section, there are two buttons: 'Approve' and 'Reject'. At the very bottom of the page, there are two more buttons: 'Edit' and 'Close'.

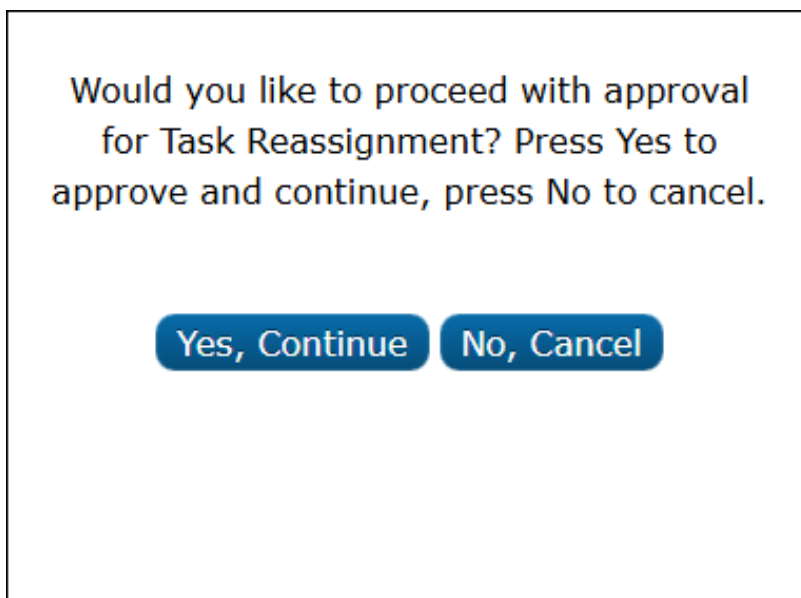
Figure 2.5.2 – Task Upload Detail Page – Reassignment Preview Complete - View Mode

2.5.3 Description of Changes

The Status of “Preview Complete” indicates that the Task Upload has proceeded through the Preview Processing step (See [Section 2.5](#)) and completed the preview logic. At this point, the page will display additional information for the outcome of the preview processing.

1. Task Upload Information: Refer to [Section 2.3.3](#) for specifics.
2. Preview Information
 - a. Tasks without Errors – This number will indicate a “Number of Tasks” value with the number of rows within the uploaded template that did not produce an error as part of the preview processing. “Number of Tasks” column with values greater than “0” will lead to the Task Distribution Preview page.
 - b. Tasks with Errors – This number will indicate a “Number of Tasks” value greater than 0 if one or more rows within the uploaded template identify an error as part of the preview processing (See [section 2.9](#)).

- c. **BUTTON:** Approve – Update this button for reassignment processing such that once it is clicked, a message displays as an overlay confirming that the user wants to proceed with Task reassignment. This button is only available when the page is in View mode. The message within this overlay is “Would you like to proceed with approval for Task Reassignment? Press Yes to approve and continue, press No to cancel.”



Pressing “Yes, Continue” will set the Task Upload status to “Approved – Tasks Processing”. Refer to [Section 2.10](#) for Approval Processing specifics.

Pressing “No, Cancel” will close the overlay and leave the Task Upload status in “Preview Complete”.

2.5.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Accessibility

None.

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 Task Upload Detail Page – Reassignment Upload - Status Upload Complete

2.6.1 Overview

This section will specifically describe the modifications of this page when the Status of a Task Upload with a Template Type of “Reassignment” is “Upload Complete”.

2.6.2 Task Upload Detail Page – Reassignment Upload - Status Upload Complete Mockup

The mockup displays the 'Task Upload Detail' page for a 'Reassignment Upload' that is 'Upload Complete'. It includes sections for 'Task Upload Information', 'Preview Information', and 'Upload Information', each with a table of task counts.

Task Upload Detail

* - Indicates required fields

Task Upload Information

Name: *	Task Reassignment Template	Status:	Upload Complete
Templates Type: *	Reassignment	File Name:	Reassignment Template.xlsx
Created By:	Vallari Bathala	Updated On:	11/22/2024
Notes:	Task reassignments for November		

Preview Information

Upload approved on 11/22/2024 01:24:39 PM by Vallari Bathala (00AALLKN01)

Value	Number of Tasks
Tasks without Errors	5
Tasks with Errors	1
Total Tasks	6

Upload Information

Upload completed on 03/11/2022 01:24:40 PM

Value	Number of Tasks
Tasks without Errors	5
Tasks with Errors	0
Total Tasks	5

Figure 2.6.2 – Task Upload Detail Page – Reassignment Upload Complete

2.6.3 Description of Changes

The Status of “Upload Complete” indicates that Task reassignment processing has completed. At this stage, the page is only available in View mode.

1. Upload Information:

- a. The “Tasks without Errors” value will display as static text and will not be a hyperlink for Task Uploads with a ‘Template Type’ of “Reassignment”.
2. Preview Information: Refer to [Section 2.5.3](#) for specifics.

2.6.4 Page Location

- **Global:** Admin Tools
- **Local:** Admin
- **Task:** Tasks > Task Upload

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Accessibility

None.

2.6.8 Page Usage/Data Volume Impacts

N/A

2.7 Task Distribution Preview Page

2.7.1 Overview

This section will specifically describe the modification of this page when User clicks on the field: “Tasks without Errors” within the “Preview Information” panel of the Task Upload Detail page for a Reassignment file.

2.7.2 Task Distribution Preview Page Mockup

Task Upload Detail

*- Indicates required fields

Void

Close

Task Upload Information

Name: *

Task Reassignment Template

Status:

Upload Complete

Templates Type: *

Reassignment

File Name:

Reassignment Template.xlsx

Created By:

Vallari Bathala

Updated On:

11/22/2024

Notes:

Task reassignments for November

Preview Information

Upload approved on 11/22/2024 01:24:39 PM by Vallari Bathala (00AALLKN01)

Value	Number of Tasks
Tasks without Errors	5
Tasks with Errors	1
Total Tasks	6

Upload Information

Upload completed on 03/11/2022 01:24:40 PM

Value	Number of Tasks
Tasks without Errors	5
Tasks with Errors	0
Total Tasks	5

Void

Close

Figure 2.7.2-1 – Task Upload Detail

Task Distribution Preview

Close

Name:

Task Reassignment Template

Distribution

Results 1 - 5 of 5

Worker ID	Bank ID	Tasks
00BB001L00		2
000AB00001		1
	00BB12340BKL	1
	00AA12340BKL	1

Close

Figure 2.7.2-2 – Task Distribution Preview Page

2.7.3 Description of Changes

Add a new Distribution panel within the Task Distribution Preview page in the CalSAWS System.

When the User clicks on the “Tasks without Errors” hyperlink from the “Preview Information” panel on the Task Upload Detail Page for a Reassignment Task Upload, the User will be directed to this page.

1. Summary

- Worker ID – This field will indicate the Worker ID attribute based on the assignment of the Task(s) to be reassigned.

- b. Bank ID – This field will indicate the Bank ID attribute based on the assignment of the Task(s) to be reassigned.
- c. Tasks – This field will indicate the number of tasks to be reassigned that align with the Worker ID and Bank ID combination.

2.7.4 Page Location

- **Global:** Admin Tools
 - **Local:** Admin
 - **Task:** Tasks > Task Upload
- Click one of the hyperlinks or buttons available on the Task Upload List Page to access the Task Upload Detail page. Then, when the Status is Preview Complete or Upload Complete, click on the hyperlink next to the field “Tasks with Errors” within the Preview Information panel.

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

Update Page Mapping with the new Worker ID, Bank ID, and Tasks columns.

2.7.7 Accessibility

None.

2.7.8 Page Usage/Data Volume Impacts

N/A

2.8 Preview Errors Page

2.8.1 Overview

This section will specifically describe the modification of this page when User clicks on the field: “Tasks with Errors” within the “Preview Information” panel.

2.8.2 Preview Errors Page Mockup

Preview Errors												
												Close
Name: Task Reassignment Template												
Summary										Results 1 - 6 of 6		
Row	Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank	Error Message
6	12345678	1234567	CalWORKs	Intake		01/01/2025	Yes	000AB00001				Assigns to Program Worker AND Specific Worker.
7	12345699	1234588				01/02/2025		000AB000o1				Invalid Worker ID.
8	12345600	1234599	CalFresh	ABAWD			Yes	00AA001L00				Results in no valid assignment.
9	12345611	1234500		Time Limits		01/08/2025			00BB12340BKL			Invalid Bank ID.
10	12345622	1234511		QR7 Received		02/01/2025				Yes		Results in no valid assignment.
11	12345633	1234522	Foster Care	180-Day EC Good Cause set to expire		01/31/2025					Yes	Results in no valid assignment.
12	12345644	1234533		Intake		02/02/2025				Yes	Yes	Results in no valid assignment.
												Close

Figure 2.8.2 – Preview Errors Page

2.8.3 Description of Changes

Summary

- Update this section of the page to display the following columns for Task Uploads with a Template Type of "Reassignment":
 - Row – The row number that corresponds to the Row Number in the upload file that was processed for the Task Upload. This value serves as a reference to the original file to identify specific rows with the identified errors.
 - Task ID – The Task ID attribute for the row.
 - Case Number – The Case Number attribute for the row.
 - Program – The Program attribute for the row.
 - Task Type – The Task Type attribute for the row.
 - Task Sub-Type – The Task Sub-Type attribute for the row.
 - Due Date – The Due Date attribute for the row.
 - Assign to Program Worker – The Assign to Program Worker attribute for the row.
 - Worker ID – The Worker ID attribute for the row.
 - Bank ID – The Bank ID attribute for the row.

- k. Remove Assigned Worker – The Remove Assigned Worker attribute for the row.
- l. Remove Assigned Bank – The Remove Assigned Bank attribute for the row.
- m. Error Message – A comma-separated list of errors detected for the row during preview processing. Reference [Section 2.9](#) for specifics of preview processing.

2.8.4 Page Location

- **Global:** Admin Tools
 - **Local:** Admin
 - **Task:** Tasks > Task Upload
- Click one of the hyperlinks or buttons available on the Task Upload List Page to access the Task Upload Detail page. Then, when the Status is Preview Complete or Upload Complete, click on the hyperlink next to the field “Tasks with Errors” within the Preview Information panel.

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

Update Page Mapping with the new Assign to Program Worker, Worker ID, Bank ID, Remove Assigned Worker, Remove Assigned Bank columns.

2.8.7 Accessibility

None.

2.8.8 Page Usage/Data Volume Impacts

N/A

2.9 Preview Processing

2.9.1 Overview

This section outlines modifications to the processing of a Reassignment Upload.

2.9.2 Preview Processing

Once a Task Upload with Template Type of “Reassignment” is moved into the “Preview Processing” Status, the CalSAWS System will begin evaluating the information that has been uploaded via the template file. A series of evaluations will take place for each row within the file to confirm the validity of information for each row as defined, determine a preview of the assignment distribution for

those Tasks to be reassigned and indicate any warnings for invalid information that may require review.

Once this processing has been completed, the uploaded file will be removed from the CalSAWS file store as the information has been read from the file and stored into the database.

Preliminary Preview Processing/Error Evaluation:

Preview processing will attempt to access the uploaded file and specifically look for the existence of a worksheet titled "Tasks" and begin reading rows of data within this worksheet beginning with row #6, which is the first row for data entry beneath the column headers.

Data Validity Preview Processing/Error Evaluation:

The following table illustrates the evaluations that will take place for each attribute within the template. Leading and trailing blank spaces will be ignored, and upper/lower case does not matter.

Field	Validation	Error Message
Task ID	1. Confirm that the Task ID value is valid and that the Task ID is associated to a Task within the county.	Invalid Task ID.
	2. If the Task ID is valid for the county and the Task is NOT in an Assigned or In Process status.	Task is closed.
Case Number	1. Confirm that the Case Number is valid for the County associated to the Task Upload.	Invalid Case Number.
Program	N/A	N/A
Task Type	1. If a Case Number value is NOT provided: Confirm that the Task Type is valid, exists for the County associated to the Task Upload AND that the Task Type is valid for the Task ID.	Invalid Task Type.

Field	Validation	Error Message
Task Sub-Type	<p>1. If a Case Number value is NOT provided:</p> <p>Confirm that the Task Sub-Type is associated to the Task Type identified in the Task Type column AND the Task Sub-Type is valid for the Task ID.</p>	Invalid Task Sub-Type.
Due Date	<p>1. If a Case Number value is NOT provided:</p> <p>Confirm that the Due Date value is valid. Due Date entered must be in MM/DD/YYYY format.</p>	Invalid Due Date.
	<p>2. If a Case Number value is NOT provided and the Due Date value is valid:</p> <p>Confirm that the Due Date value entered matches the Due Date for the associated Task.</p>	Invalid Due Date for the associated Task.
Assign to Program Worker	<p>1. Confirm the value is either "Yes" or BLANK.</p>	Invalid Assign to Program Worker.
	<p>2. If Assign to Program Worker is "Yes":</p> <p>Confirm there exists a Program Worker.</p>	Program Worker Unavailable.
Worker ID	<p>1. Confirm that the Worker ID exists for the County associated to the Task Upload.</p>	Invalid Worker ID.
	<p>2. If Worker ID has a valid value:</p> <p>Confirm Assign to Program Worker is not "Yes".</p>	Assigns to Program Worker AND Specific Worker.

Field	Validation	Error Message
Bank ID	1. Confirm that the Bank ID exists for the County associated to the Task Upload.	Invalid Bank ID.
Remove Assigned Worker	1. Confirm value is either "Yes" or BLANK.	Invalid Remove Assigned Worker.
	2. If the 'Remove Assigned Worker' value is "Yes": Confirm there exists a Bank ID assigned to the Task.	Results in no valid assignment.
Remove Assigned Bank	1. Confirm value is either "Yes" or BLANK.	Invalid Remove Assigned Bank.
	2. If the 'Remove Assigned Bank' value is "Yes": Confirm there exists a Worker ID assigned to the Task.	Results in no valid assignment.

If a Case Number IS provided, the only fields that will process preview validations are:

- Task ID
 - Case Number
 - Assign to Program Worker
- or
- Both Worker ID and Bank ID
- or
- Remove Assigned Worker
- or
- Remove Assigned Bank

If a Case Number is NOT provided, the following fields will be evaluated for preview validations:

- Task ID
 - Task Type
 - Task Sub-Type
 - Due Date
 - Assign to Program Worker
- or

Both Worker ID and Bank ID
or
Remove Assigned Worker
or
Remove Assigned Bank

2.9.3 Preview Processing Example Scenarios

This section provides a few examples of errors identified during processing the data uploaded via a Reassignment Upload file.

Task Upload										
Reassignment										
Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345678	1234567	CalWORKs	Intake		01/01/2025	Yes				
12345679	1234568				01/02/2025		000AB00001			
12345680	1234569	CalFresh	ABAWD			Yes	00AA001L00			
12345681	1234570		Time Limits		01/08/2025			00BB12340BKL		
12345682	1234571		QR7 Received		02/01/2025				Yes	
12345683	1234572	Foster Care	180-Day EC Good Cause set to expire		01/31/2025					Yes
12345684	1234573		Intake		02/02/2025				Yes	Yes

Figure 2.9.3 - 1 – Reassignment Template with data

Preview Errors												
												Close
Name: Task Reassignment Template												
Summary											Results 1 - 6 of 6	
Row	Task ID	Case Number	Program	Task Type	Task Sub-Type	Due Date	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank	Error Message
6	12345678	1234567	CalWORKs	Intake		01/01/2025	Yes					Program Worker Unavailable.
7	12345679	1234568				01/02/2025		000AB00001				Invalid Worker ID.
8	12345680	1234569	CalFresh	ABAWD			Yes	00AA001L00				Results in no valid assignment.
9	12345681	1234570		Time Limits		01/08/2025			00BB12340BKL			Invalid Bank ID.
10	12345682	1234571		QR7 Received		02/01/2025				Yes		Results in no valid assignment.
11	12345683	1234572	Foster Care	180-Day EC Good Cause set to expire		01/31/2025					Yes	Results in no valid assignment.
11	12345684	1234573		Intake		02/02/2025				Yes	Yes	Results in no valid assignment.
												Close

Figure 2.9.3 - 2 – Preview Processing page with errors

Example 1:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345678	1234567	Yes				

Assign the Task to the Program Worker.

Result: Preview Processing will evaluate Case 1234567 for a CalWORKs program and identify that the program does not have an assigned program worker. The Preview Processing page will display the following error in this instance:

Error: Program Worker Unavailable.

Example 2:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345679	1234568		000AB000o1			

Assign the Task to a specific worker.

Result: Preview Processing will evaluate the Worker ID provided and identify that the worker does not exist in the County. The Preview Processing page will display the following error in this instance:

Error: Invalid Worker ID.

Example 3:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345680	1234569	Yes	00AA001L00			

Assign the Task to the Program Worker **and** a specific worker.

Result: Preview Processing will identify that the Task cannot be assigned to two workers simultaneously. The Preview Processing page will display the following error in this instance:

Error: Assigns to Program Worker AND Specific Worker.

Example 4:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345681	1234570			00BB12340BKL		

Assign the Task to a specific Bank.

Result: Preview Processing will evaluate the Bank ID provided and identify that the Bank does not exist in the County. The Preview Processing page will display the following error in this instance:

Error: Invalid Bank ID.

Example 5:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345682	1234571				Yes	

Remove the Worker assigned from a Task that does not have a Bank assignment.

Result: Preview Processing will evaluate the Task for an assigned worker. The processing will also evaluate for a Bank assigned to the Task to confirm that a valid Bank assignment will remain. If a Bank is not identified, the Preview Processing page will display the following error in this instance:

Error: Results in no valid assignment.

Example 6:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345683	1234572					Yes

Remove the Bank assigned from a Task that does not have a Worker assignment.

Result: Preview Processing will evaluate the Task for an assigned Bank. The processing will also evaluate for a worker assigned to the Task to confirm

that a valid Worker assignment will remain. If a Worker is not identified, the Preview Processing page will display the following error in this instance:

Error: Results in no valid assignment.

Example 6:

Task ID	Case Number	Assign to Program Worker	Worker ID	Bank ID	Remove Assigned Worker	Remove Assigned Bank
12345684	1234573				Yes	Yes

Remove both Worker **and** Bank assigned to a Task.

Result: Preview Processing will identify that removing both worker and Bank will result in an unassigned Task. The Preview Processing page will display the following error in this instance:

Error: Results in no valid assignment.

2.10 Preview Approved/Upload Processing

2.10.1 Overview

This section outlines the processing once a preview is Approved.

2.10.2 Preview Processing

Once a Task Upload with Template Type of "Reassignment" is moved into the "Approved – Tasks Processing" Status, the CalSAWS System will update the following attributes for the valid Tasks:

- The Task assignment will be reassigned as specified in the Reassignment template.
- The Task History transaction will be logged in the Task Detail page to indicate the reassignment change. Refer to [Section 2.11](#) for additional specifics.
- The Newly Assigned Indicator will be set to Yes.

2.11 Task Pop-Up: Task Detail Page

2.11.1 Overview

This section outlines the modifications to the Task Pop-Up: Task Detail page to update the Task History panel to display the Reassignment Task Upload name if a Task has been reassigned via a Reassignment upload template.

2.11.2 Task Pop-Up: Task Detail Page Mockup

Task Detail

Result 1 of 1 - 1

Help

*- Indicates required fields

Task ID: 21436587

Images

Start Watching

Edit

Print

Close

Case Number: *

5444890

Case Name:

Case Name

Program(s): *

CalFresh

Status: *

In Process

Reference Number:

Category: *

Case Update

Type: *

Undeliverable Mail Received

Sub-Type:

Priority:

Low

Expedited:

Due Date: *

11/05/2024

Date Created:

11/02/2024

Worker Assigned Date:

11/22/2024

Start Date:

Assign to Program Worker:

No

Worker ID:

00AA001L00

Bank ID:

00AA04ZG0BBK

Automated Action:

No

Long Description:

Instructions

Task History

Modified on 11/22/2024 11:20:02 AM by John Doe (Task Upload: Bank A Tasks to Program Worker)

Field	Old Value	New Value
Worker	00DP000N01	00AA001L00
Bank	00ALL0000BBK	00AA04ZG0BBK

Modified on 11/02/2024 04:04:31 PM by John Doe (00DP000N01)

Field	Old Value	New Value
Status	Assigned	In Process

Task Time Record

Figure 2.11.2 – Task Pop-Up: Task Detail Page

2.11.3 Description of Changes

1. Modify the Task History panel of the Task Pop-Up: Task Detail page to include the Reassignment template title for reassignments that occurred from a Reassignment upload file. The format will display as:

"Modified on <Date Time> by <Staff Name> (Task Upload: <Name>)".

Example 1: Task reassignment processed via template upload

Modified on 11/22/2024 11:20:02 AM by John Doe (Task Upload: Bank A Tasks to Program Worker)

2.11.4 Page Location

- **Global:** N/A
- **Local:** N/A
- **Task:** N/A
 - Page is accessible through Utility bar's Tasks Option.

2.11.5 Security Updates

N/A

2.11.6 Page Mapping

N/A

2.11.7 Accessibility

None.

2.11.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Tasks	Task Upload – Reassignment Template	 Reassignment Template.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.5	<p>CalSAWS shall allow COUNTY-specified Users to access alerts, reminders, and controls by using the following criteria in order to initiate a search:</p> <ul style="list-style-type: none">a. All alerts, reminders, and controls on a case or a file;b. A specified due date or a range of due dates;c. Type of alert, reminder, or control; andd. Status of alert, reminder, or control.	<ol style="list-style-type: none">1. Incorporate a "Reassignment" template to the Task Upload pages and processing framework that will allow counties to upload up to 10 thousand Tasks to be reassigned in mass.

5 OUTREACH

N/A

6 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System



CA-281630

Request to send the 09 Aid Code to the QF screen in MEDS for CalFresh-GA Cases

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Eric Delaney	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
1/15/2025	1	Initial Draft	Eric Delaney
1/31/2025	1.1	Update to current design template	Eric Delaney
3/10/2025	1.2	Update to reflect aid code changes	Eric Delaney
3/21/2025	1.3	Update design based on review comments	Eric Delaney

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CA-281360 – Request to send the 09 Aid Code to the QF screen in MEDS for CalFresh-GA Cases

1 OVERVIEW

This SCR will update existing batch job for FX20, FX40, and FR20 MEDS transactions to send the 09 Aid Code.

1.1 Current Design

Current design is that if it's a PACF-GAGR case (everyone on GAGR and CF) then the system will assign CF the GAGR aid code, and that is what is being sent to MEDS.

1.2 Requests

On CalFresh cases with specific GA/GR aid codes, update CalSAWS logic to send 09 aid code to MEDS.

Issue:

On cases with a CalFresh program block and a GA/GR* aid code (e.g., 9A, 9B, 9G, 9H, 9I, 9J), MEDS does not accept the alpha-numeric aid codes on the CalFresh (INQF) screen. The transactions are rejected and MEDS Alert 0529 - INVALID AID-CODE FOR THIS TRANSACTION is generated.

1.3 Overview of Recommendations

1. Update FX20, FX40, and FR20 transactions to send 09 aid code to MEDS, when CalSAWS shows 9A, 9B, 9G, 9H, 9I, 9J aid codes on the CalFresh Program block.

Note: This recommendation mirrors current CalSAWS-MEDS interface functionality for the GA/GR program block. See CS0179728 resolution notes.

1.4 Assumptions

1. Due to changes implemented with SCR CA-244842, counties using the GA/GR Automated Solution for PACF households will continue to see the GA aid code assigned to the CalFresh program in CalSAWS.
2. CalSAWS will continue to send aid code 9G in the MEDS transactions outlined in SCR CA-215681.
3. MEDS accepts aid code "09"

2 RECOMMENDATIONS

2.1 MEDS FX20, FX40, and FR20

2.1.1 Overview

MEDS Batch Jobs FX20, FX40, and FR20 currently send GAGR Aid Code to MEDS. Update MEDS FX20, FX40 and FR20 batch jobs to send 09 aid code instead.

2.1.2 Description of Change

1. Update MEDS FX20 to send 09 aid code.
2. Update MEDS FX40 to send 09 aid code.
3. Update MEDS FR20 to send 09 aid code.

2.1.3 Execution Frequency

High-frequency cyclic (Daily)

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All

2.1.6 Category

Core-Off Prime

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

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

CalSAWS

California Statewide Automated Welfare System



CA-281889

CalHEERS eHIT: Accelerated Enrollment Enhancements

DOCUMENT APPROVAL HISTORY

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11/25/2024	0.1	Initial Draft	Tisha Mutreja
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4/16/2025	0.9	Update 2.1.2.1 to display the Language conversion from CalHEERS to CalSAWS	Tisha Mutreja

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CA-281889 – CalHEERS eHIT: Accelerated Enrollment Enhancements

1 OVERVIEW

Per DHCS, Notification process needs to be enhanced regarding Accelerated Enrollment so that members that apply with the county or via BenefitsCal can view when they have been approved for Accelerated Enrollment. This SCR relates CalHEERS changes with CR 278587 where CalHEERS will transfer the NOD01 notice to CalSAWS when at least one individual on the case is determined Conditionally Eligible for 8E (Accelerated Enrollment) from CalSAWS and at least one individual is Conditionally Eligible for Accelerated Enrollment (AE) at the end of the day prior to the Notice batch run.

1.1 Current Design

Currently, CalHEERS does not provide the Accelerated Enrollment approval notice to CalSAWS via file transfer for individuals granted Accelerated Enrollment and CalSAWS has no functionality to display the AE approval notice in the CalSAWS Access channel.

1.2 Requests

1. Receive the Accelerated Enrollment notice from CalHEERS via file transfer so that it is available in CalSAWS Distributed Documents and viewable within the Self-Service Portal (SSP).
2. NOAs will not be flagged for Central Print/re-print.
3. Add a New Status <Received from CalHEERS> for the SSP to pull it off from Generate_Doc for AE notices.
4. Create Inbound Job to receive notices from interface and store them on Amazon Simple Storage Service (S3).
5. Document Journal that the NOA is saved to CalSAWS Case

1.3 Overview of Recommendations

1. CalSAWS will decrypt, unzip and store in S3 with respective document references created in the database to make NOD01 notices available for the BenefitsCal and CalSAWS Distributed Documents.

1.4 Assumptions

1. The new status for NOAs received from CalHEERS will not have an impact on Reports.
2. This change is display only and has no changes to Medi-Cal Eligibility Rules and Medi-Cal Hierarchy.

2 RECOMMENDATIONS

2.1 Inbound Job

2.1.1 Overview

CalHEERS will send zipped and encrypted files via SFTP to CalSAWS and CalSAWS will decrypt, unzip and store in S3 with respective document references created in the database to make NOD01 notices available for the BenefitsCal.

2.1.2 Description of Change

1. Create a new inbound job to receive NOD01 files in JSON format from CalHEERS as follows:
 - a. File Naming Convention:

Zip File Name	File Name inside the Manifest File	Manifest File Name
to_saws_nod01_notice_[DATEandTIME].zip.pgp	saws_[noticeType]_[DER_ID]_[DOCUMENT LANGUAGE CODE]_[DATEandTIME].pdf	manifest_saws_notice_transfer_[DATEandTIME].json

- b. Manifest File Structure:

Data Element	TYPE	REQUIRED	Min Length	Max Length	Description
batchInstanceId	Integer	R	1		This specifies the instance of the batch run
batchRunDate	Date	R	10	10	This specifies the date of the batch run. Date value is in mm/dd/yyyy format
Filecount	Integer	R	1		The specifies the number of notices transferred in the respective zip file
fileDetails	Repeats	R	1		This contains elements related to file details properties
indvCaseld	Integer	R			The specifies the case id of the household member

Data Element	TYPE	REQUIRED	Min Length	Max Length	Description
derId	Integer	R			This specifies the latest DER ID of the respective case
noticeGenerationDate	Date	R	10	10	This specifies the date on which the notice is generated. Date value is in mm/dd/yyyy format
noticeType	String	R			This specifies the type of notice sent
fileNames	Repeats	R	1		This contains elements related to notice file language and name
documentLang	String	R	2	2	This specifies the Language code of the Notice document. The language codes will be one of the codes from Table below
filename	String	R	1	60	This specifies the file name of the Notice shared

c. Language Code:

The table below displays the conversion of Language code received from CalHEERS to CalSAWS Language Decode to be displayed on the Distributed Documents Page (Refer to recommendation 2.4.2.9)

CalHEERS Values		CalSAWS Conversion	
Data Element	TYPE	CODE	Language Decode
EN	English	03	English
AC	Arabic	25	Arabic
AR	Armenian	13	Armenian
FA	Farsi	28	Farsi
CM	Cambodian	12	Cambodian

CalHEERS Values		CalSAWS Conversion	
Data Element	TYPE	CODE	Language Decode
CH	Traditional Chinese Character	08	Other Chinese Language
HM	Hmong	16	Hmong
KO	Korean	05	Korean
RU	Russian	22	Russian
SP	Spanish	02	Spanish
TA	Tagalog	06	Tagalog, Filipino
VI	Vietnamese	29	Vietnamese
HI	Hindi	31	Hindi
PA	Punjabi	33	Punjabi
CN	Cantonese	10	Cantonese (Chinese)
MA	Mandarin	11	Mandarin (Chinese)

Note: Currently, CalSAWS displays all correspondence in Chinese for various Chinese dialects. The functionality will not change with this effort and hence, all three different Chinese Dialects received from CalHEERS will be displayed as Chinese (CH) in CalSAWS Distributed Documents Page.

2. Create a new set of Batch Properties for a new Batch Job (similar to PICHE262) to move received files from a shared folder to an existing job-specific folder implemented with CA-251982 in release 24.02
Existing Folder Location: /u01/export/<Environment>/HHSDC-SFTP/CalHEERS/inbound

Technical Note:

CalHEERS will deposit files into the location that is bound to the folder /u01/export/<Environment>/HHSDC-SFTP/CalHEERS/inbound on the FTP server.

Current FTP frameworks automatically move received files from the FTP server to the Batch server into a shared folder:

/u01/transfer/<Environment>/HHSDC-SFTP/CalHEERS/inbound.

This new set of properties will be configured to move the zip file <to_saws_nod01_notice_[DATEandTIME].zip.pgp> from the shared folder to a location in the S3 storage where the next job will find them.

3. Create a new set of Batch Properties for a new Batch Job to Decrypt files and store the result in a location in the S3 storage where the next job will find them.
 4. Create a new Reader Module and Batch Properties for a new Batch Job to unzip and process the received files as follows:
 - a. Unzip each received file.
 - b. Locate a Manifest file and process each entry in it. Manifest File structure to be found in Section 3: Supporting Documents
 - c. For each entry, locate the PDF file, store it in S3, and create records in the database to reference the S3 items.
 - i. Save the following fields in GENERATE_DOC as below
 1. ICT_ID associated to the derId received in the manifest file
 2. SNIPPET_ID as the Document Name in Distributed Documents List (refer to recommendation 2.4.2.6)
 3. DOC_DATE as noticeGenerationDate received in the manifest file
 4. STAT_CODE as the new Document Status in CT_220(refer to recommendation 2.4.2.1)
 5. PGM_ID associated to the derId received in the manifest file
 6. CASE_ID as the CalSAWS CASE_ID associated to the derId received in the manifest file
 - d. Store English Files and Non-English Files separately-as shown in Figure 2.4.2.1 and 2.4.2.2 in section 2.4.2.
Set the document status to
 - 'CH' for English only file or Non-English File
 - 'CT' for English translation for the Non-English file
(see Client Correspondence Recommendation 2.4).
 - e. **Error Handling:** A unique record is identified with the combination of ICT_ID, SNIPPET_ID, DOC_DATE, STAT_CODE, PGM_ID, CASE_ID in GENERATE_DOC
 - i. If a duplicate record is processed for the above combination, then replace the existing NOD01pdf (GENERATE_DOC.ALF_FMS_NUM) with the new received file
 - ii. If any other error occurs during the batch processing and case(s) cannot be processed due to any reasons such as valid DER ID not found or associated Case ID is not found, then rollback only the individual case(s) that experienced the failure. Log the failure reason in Batch Log file. Continue processing and committing all other cases that were successfully processed.
- Note:** Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.1.3 Execution Frequency

Monday through Saturday excluding holidays

2.1.4 Key Scheduling Dependencies

N/A

2.1.5 Counties Impacted

All

2.1.6 Category

Non-Core

2.1.7 Data Volume/Performance

100 records per day. Negligible impact to the system performance.

2.1.8 Interface Partner

CalHEERS

2.1.9 Failure Procedure/Operational Instructions

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

2.2 Self-Service Portal – Case Inquiry Application Programming Interface (API)

2.2.1 Overview

The Case Inquiry API is a RESTful API that returns all case information of the CalSAWS person record that is linked to the SSP account provided that the case meets the existing business logic. This API will be updated to return an indicator if the Medi-Cal program person is AE-eligible and the AE month of eligibility.

2.2.2 Description of Change

1. Update the Case Inquiry API to include the following fields as part of a successful 200 response (Refer to the Interface Documentation under Supporting Documents):

GET – Case Inquiry - Response			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
acceleratedEnrollmentInd	boolean	Returns true if the person is eligible for	N/A

GET – Case Inquiry - Response			
CALSAWS FIELD NAME	TYPE	COMMENTS	REQUIRED
		Accelerated Enrollment (AE).	
acceleratedEnrollmentMonth	String Format: Date	The month that the Accelerated Enrollment is granted. If the individual is not AE, the date is null.	N/A

2.2.3 Execution Frequency

Real-time

2.2.4 Key Scheduling Dependencies

N/A

2.2.5 Counties Impacted

CalSAWS Counties

2.2.6 Category

N/A

2.2.7 Data Volume/Performance

No impact to this section.

2.2.8 Interface Partner

Self-Service Portal

2.2.9 Failure Procedure/Operational Instructions

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

2.3 Self-Service Portal - Notices Application Programming Interface (API)

2.3.1 Overview

The Notices API is a RESTful API that pulls the notices and forms that were generated for a person in CalSAWS and sends it to the SSP in real time. This API will be updated to pull the Accelerated Enrollment notice with the new status that is added in this enhancement.

2.3.2 Description of Change

1. Update the Notices API to return forms with the status 'Received from CalHEERS'. (Refer Recommendation 2.4)
2. Update the 'noticeDescr' field to return the template name along with the action code when a customer has a NOA generated for them to view.
 - a. Technical note: The noticeDescr value will concatenate the decoded generate_doc.actn_code and the noa_snippet_config.templ_name.

2.3.3 Execution Frequency

Real-time

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

CalSAWS Counties

2.3.6 Category

N/A

2.3.7 Data Volume/Performance

No impact to this section.

2.3.8 Interface Partner

Self-Service Portal

2.3.9 Failure Procedure/Operational Instructions

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

2.4 Client Correspondence – Add new NOA status

2.4.1 Overview

A new document status is needed for the PDF NOAs to be received from CalHEERS. Since the NOAs will be from outside our system and will not have the mailing header we require for mailing, printing them will be disabled. The new status will only allow users to view the NOA and not print/reprint it.

2.4.2 Description of Change

1. Create a new document status of 'CH' that will display in the Distributed Documents List page as 'Received from CalHEERS' for only English only notices or for Non-English notices.
'CT' that will display in the Distributed Documents List page as 'CalHEERS Translated' for English Translation of the Non-English notices.

Tech Note #1: insert new records in CT220:

- b. code_num_identif='CH', short_decode_num, long_decode_num='Received from CalHEERS', code_descr='The NOA was received from CalHEERS either in English or Non-English'
- c. code_num_identif='CT', short_decode_num, long_decode_num='CalHEERS Translated', code_descr='The NOA was received from CalHEERS in English translation of the threshold languages'

Tech Note #2: Updates to the NOA connector query might be necessary with a new status.

2. Make sure the new statuses behave like the 'View' status and the NOAs don't have a Detail button next to them on the Distributed Documents List page. There will be no Print buttons available when opening the document.

3. The new statuses need to be exempt from the process that deletes NOAs not yet printed, similarly to the Hold for Pickup (HP) and View (VW) statuses.

Tech Note: NoaInterfaceDaoImpl.deleteNOAsNotYetPrinted() and the listStatusCodes being passed to it.

4. The new statuses need to be exempt from the process that readies documents for Central Print.

Tech Note: GenerateNoaConsumerMessageProcessor.generateNoaDocument() + GenerateNoaBatch.execute()

5. If a language pair is received (e.g.: a Spanish document and an English version of that document), the current functionality will be applied, and the

documents will be associated. Documents that are associated with each other are typically displayed in the system with the ('+') symbol in the Distributed Documents List page. The English and the Non- English version of the document will also have the 'CH' status. The English Translation of the threshold version of the document will have the 'CT' status.

6. The new notice will have the following name in the Distributed Documents List Page:

NOA - MC – ACCELERATED ENROLLMENT ELIGIBILITY

Technical Note:

For NOAs: Document Name is saved as "NOA - [PGM] - [ACTN]} - NOA_SHORT_DESCR" where NOA_SHORT_DESCR is from NOA_SNIPPET_CONFIG table

For Forms: Document Name is saved as DOC_TEMPL.TEMPL_TITLE_NAME

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
01/30/2025 10:10 PM	NOA - MC – ACCELERATED ENROLLMENT ELIGIBILITY (SP)		Medi-Cal	Received from CalHEERS	

Figure 2.4.2.1: Collapsed NOA display on Distributed Documents List Page

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
01/30/2025 10:10 PM	NOA - MC – ACCELERATED ENROLLMENT ELIGIBILITY (SP)		Medi-Cal	Received from CalHEERS	
01/30/2025 10:10 PM	NOA - MC – ACCELERATED ENROLLMENT ELIGIBILITY		Medi-Cal	CalHEERS Translated	

Figure 2.4.2.2: Expanded NOA display on Distributed Documents List Page with both English and Spanish Language saved separately

7. Populate the PERS_ID of the Primary Applicant of the active Medi-Cal program in the GENERATE_DOC table for the Accelerated Enrollment NOA record.
8. DCR to retrieve the new sequence number for the CalHEERS NOA by language and update CT145 for the respective language.
9. CTCR to reserve a column in CT145 for NOA_ID retrieved to correctly map the language received from CalHEERS to the respective language in CalSAWS.

2.5 Client Correspondence – Add custom Journal Entry

2.5.1 Overview

A new custom Journal entry is needed for the PDF NOAs saved to Distributed Documents.

2.5.2 Description of Change

Create a custom Journal Entry record when a NOA is added to Distributed Documents with a status of 'Received from CalHEERS'.

Journal Entry	Description
New/Update	New
Category	All
Type	Document
Short Description	NOA received from CalHEERS
Long Description	The following NOA was received from CalHEERS: NOA - MC - ACCELERATED ENROLLMENT ELIGIBILITY
Trigger Condition	When a NOA is inserted into generate_doc with a stat_code of 'CH'

A check will be added so that when a language pair is received and the documents are associated, only 1 Journal Entry record will be created.

2.6 Automated Regression Test

2.6.1 Overview

Create new automated regression test scripts to verify that for an applicable case, the successful 200 response from the Case Inquiry API includes the Accelerated Enrollment fields.




2.6.2 Description of Change

1. Create a new regression script to verify that when a valid request is sent to the Case Inquiry API for a case with a person eligible for Accelerated Enrollment, the response includes the following fields:
 - a. acceleratedEnrollmentInd

b. acceleratedEnrollmentMonth

Technical Note: Automated regression testing of the Notices API change is out of scope due to the required manual data setup for a CalHEERS-initiated document scenario.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Interface	Artifacts received from CalHEERS	 Artifacts provided by CH_IDD.zip
2	Interface	Sample NOA incoming from CalHEERS	 AE_CalNOD01_Sample.pdf
3	Interface	IDD	 IDD-CalHEERS_SAWS_Notices.docx
4	Interface	Case Inquiry YAML file	CaseInquiry.yaml
5	Interface	Case Inquiry HTML file	CaseInquiry.html

Design

CA-282331

ACL 24-74 Cal-Learn SB 521

DOCUMENT APPROVAL HISTORY

Prepared By	Connor O'Donnell
Reviewed By	Erika Kusnadi, Gingko Luna

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
3/10/2025	1.0	Initial Draft	Connor O'Donnell

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CA-282331 – ACL 24-74 Cal-Learn SB 521

1 OVERVIEW

This SCR will include the Online updates to the Cal-Learn Status Detail page with new Status Reasons for the 'Exempt' Status. A validation will also be added to limit the dates at which these new Status Reasons can be selected.

1.1 Current Design

The Cal-Learn exemption reasons in CalSAWS do not fit any of the reasons outlined in ACL 24-74.

1.2 Requests

As of January 1, 2024, in addition to the Cal-Learn exemptions described in MPP Section 42-763.2, ACL 24-74 adds the following Cal-Learn participation exemption reasons. ACL 24-74 also states exemptions are not limited to those reasons in the letter, therefore an exemption reason of 'Other' will be added as well:

- 1) Homelessness or imminent risk of homelessness.
- 2) A lack of safety due to domestic violence.
- 3) Untreated or undertreated behavioral and mental health needs.
- 4) The misuse of controlled substances or alcohol
- 5) Other

1.3 Overview of Recommendations

1. Update the Cal-Learn Status Detail page to add 5 new Status Reasons for an Exempt Status Reason.
 - a. Add the following new options to the 'Status Reason' drop-down field when for an 'Exempt' status (Status field):
 - i. Homelessness or imminent risk of homelessness.
 - ii. A lack of safety due to domestic violence.
 - iii. Untreated or undertreated behavioral and mental health needs.
 - iv. The misuse of controlled substances or alcohol
 - v. Other
2. Add a new validation that will be trigger when user clicks on the 'Save and Return' button and the Status Reason is one of the following new 5 options added and the Begin Month is prior to January 1, 2024

1.4 Assumptions

1. The newly added status reasons will not impact the STAT 45 since it has not been updated to include the new exemption reasons.

2. CA-289507 will address disablement of Cal-Learn non-compliance functionality, until then workers should not initiate the non-compliance process or impose a sanction.
3. No updates to the CL 3 will be done via this SCR. A future SCR will be created when the updates to the CL 3 are provided by the state.
4. Fiscal changes related to these new status reasons will be addressed separately in CA-288946

2 RECOMMENDATIONS

2.1 Cal-Learn Status Detail

2.1.1 Overview

The Cal-Learn Status Detail page is where statuses for the Cal-Learn program are added and updated. This change will add five new Status Reasons that will appear when the Status of 'Exempt' is selected.

2.1.2 Cal-Learn Status Detail Mockup

Cal-Learn Status Detail

*- Indicates required fields

Save and Return Cancel

Status: *
Exempt

Status Reason: *
- Select -

Begin Month: *
03/2025

Expelled
Support serv unavailable
Medical Reason
Funding related problems
CalWORKs-FC
Homelessness or imminent risk of homelessness
A lack of safety due to domestic violence
Untreated or undertreated behavioral and mental health needs
The misuse of controlled substances or alcohol
Other

Save and Return Cancel

This Type 1 page took 1.21 seconds to load

Figure 2.1.1 – Cal-Learn Status Detail Mockup

2.1.3 Description of Changes

1. Add the following values to the Status Reason dropdown list. These values will only appear when the Status field has been set to 'Exempt':
 - a. 'Homelessness or imminent risk of homelessness'
 - b. 'A lack of safety due to domestic violence'
 - c. 'Untreated or undertreated behavioral and mental health needs'
 - d. 'The misuse of controlled substances or alcohol'
 - e. 'Other'
2. Add the following validation to the page
 - a. Validation: The user saves the page when one of the five status reasons listed above are selected and the Begin Month is prior to January 1st, 2024
 - b. Message: 'Begin Month – The Begin Month for this Status Reason must be 01/2024 or later'

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Cal-Learn**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

NA

2.1.7 Accessibility

No accessibility updates needed.

2.1.8 Page Usage/Data Volume Impacts

N/A

Design

CA-283216

Update TEMP 2313 and TEMP 2035 to include
Cash Reactivated Expungements and
Update template according to CFL 24/25-41

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	TK Bui	
	Reviewed By	Claudia Pinto, Denise Barajas, Thao Ta, Gokul Suresh, Ravneet Bhatia, Ketan Patel, Qi Jing	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
02/13/2025	1.0	Initial document	TK Bui
3/24/2025	1.1	Updated attached mockup and mockup screenshots.	TK Bui

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CA-283216 – Update TEMP 2313 and TEMP 2035 to include Cash Reactivated Expungements and Update template according to CFL 24/25-41

1 OVERVIEW

The TEMP 2313 EBT THEFT – Scam and TEMP 2035 EBT THEFT – Skimming reports provide information on reimbursement claims for Electronic Benefit Transfer (EBT) replacements due to electronic theft by scams or skimming for select programs.

Currently, the TEMP 2313 and TEMP 2035 do not include cash reactivated expungements. Cash replacement benefits due to electronic theft can be expunged and they are eligible to be reinstated. The CalSAWS system is also currently not designed to reactivate/reinstate CalFresh expungements. With SCR CA-277821, the system will reactivate ACL/CFL CalFresh replacements due to electronic theft which were issued as cash benefits before or on 11/30/2023 that have since been expunged. Normal CalFresh benefits which were issued as Food benefits are NOT eligible to be reactivated. After CA-277821 is implemented, the TEMP 2313 and TEMP 2035 should also capture these CalFresh reactivated expungements which were initially issued as cash benefits.

Additionally, the TEMP 2313 and TEMP 2035 currently capture CalFresh replacements with pay code **1F** – CalFresh EBT Theft Food Replacement (CT-623) as “CalFresh Federal” in the summary sheet column and the detail sheets’ Reporting Column. With ACL 24-62E, effective December 21, 2024, CalFresh replacements are no longer federally funded. Instead, the new benefit type of State-Funded Replacement SNAP for Electronic Theft (SRFPSN) allows for the replacement of electronically stolen CalFresh benefits with state-funded food benefits. CFL 24/25-41 details the following new CalFresh columns to be used in the TEMP 2313 and TEMP 2035 due to this change:

- “CFAP/CalFresh State 12/21/24-Current” column:
 - All CalFresh benefit replacements issued with the SFRPSN benefit type as of December 21, 2024, must be reported to the newly added “CFAP/CalFresh State 12/21/24-Current” column only. This column is for informational purposes only and there is no reimbursement to counties for costs reported. Counties are required to report costs and adjustments, accordingly, for accurate data reporting.
- “CFAP/CalFresh Federal 12/01/23-12/20/24” column:
 - The “CFAP/CalFresh Federal 12/2023” column has been retitled to “CFAP/CalFresh Federal 12/01/23-12/20/24” to include the end date of the federal benefit replacement policy. No new costs should be reported to this column for benefits issued as of December 21, 2024. This column remains on the claim for adjustments tied to prior food benefit

replacements using the “Transitional Food Stamp” (TFSP) or “Replacement SNAP” (RPSNAP) benefit types from December 1, 2023, to December 20, 2024. This column is for informational purposes only (CFL 23/24-55) and there is no reimbursement to counties for costs reported. Counties are required to report costs and adjustments, accordingly, for accurate data reporting.

- “CalFresh State 10/29/21-11/30/23” column:
 - The “CalFresh State 10/29/21-11/30/23” column is only for adjustments for cash benefit replacements using the Electronic Theft Replacement Cash Benefits (ETRCB) benefit type from October 29, 2021 to November 30, 2023 (CFL 21/22-61) that are still within the adjustment timeframe (refer to CFL 13/14-01). There are no major changes to this column.

The logic in the TEMP 2313 and TEMP 2035 will be updated to capture these cash reactivated expungements, including the CalFresh replacements that were issued as Cash with benefit type ETRCB before or on 11/30/2023 and have since been expunged and then reactivated after CA-277821. The templates of the TEMP 2313 and TEMP 2035 will also be updated to remove the “CalFresh Federal” column and add the three new CalFresh-related columns as detailed above. The logic will be updated to categorize CalFresh replacements on the summary and detail sheets according to the requirements of these new columns.

1.1 Current Design

Currently, the TEMP 2313 and TEMP 2035 do not include cash reactivated expungements. Cash replacement benefits due to electronic theft can be expunged and they are eligible to be reinstated. This includes CalFresh replacements that were issued as Cash with benefit type ETRCB before or on 11/30/2023. Additionally, CalFresh replacements with a pay code of **1F** – CalFresh EBT Theft Food Replacement are reported under the “CalFresh Federal” column in the TEMP 2313 and TEMP 2035.

1.2 Requests

The logic in the TEMP 2313 and TEMP 2035 will be updated to include cash reactivated expungements. Additionally, the “CalFresh Federal” column will be removed, and the “CFAP/CalFresh State 12/21/24-Current”, “CFAP/CalFresh Federal 12/01/23-12/20/24”, and “CalFresh State 10/29/21-11/30/23” columns will be added as per CFL 24/25-41 due to the change in ACL 24-62E for counties to use the SFRPSN benefit type for CalFresh food replacements effective December 21, 2024.

1.3 Overview of Recommendations

1. Update the logic in the TEMP 2313 to include cash reactivated expungements.
2. Update the template in the TEMP 2313 to remove the “CalFresh Federal” column and add the “CFAP/CalFresh State 12/21/24-Current”, “CFAP/CalFresh Federal 12/01/23-12/20/24”, and “CalFresh State 10/29/21-11/30/23” columns.

- a. Update the logic in the summary and detail sheets to categorize CalFresh replacements accordingly.
- 3. Update the logic in the TEMP 2035 to include cash reactivated expungements.
- 4. Update the template in the TEMP 2035 to remove the "CalFresh Federal" column and add the "CFAP/CalFresh State 12/21/24-Current", "CFAP/CalFresh Federal 12/01/23-12/20/24", and "CalFresh State 10/29/21-11/30/23" columns.
 - a. Update the logic in the summary and detail sheets to categorize CalFresh replacements accordingly.

1.4 Assumptions

- 1. CalFresh replacements due to electronic theft which were issued as cash benefits before or on 11/30/2023 and have since been expunged can be reactivated in the system starting with CA-277821.
 - a. This will NOT include CalFresh benefits which were issued as Food benefits, as denoted with pay code **1F** – CalFresh EBT Theft Food Replacement (CT-623).

2 RECOMMENDATIONS

2.1 TEMP 2313 EBT THEFT – Scam

2.1.1 Overview

The TEMP 2313 EBT THEFT – Scam is a monthly scheduled state report which provides reimbursement claim information for EBT replacements due to electronic theft by scams. Currently, the TEMP 2313 does not report on any cash reactivated expungements. The CalSAWS system is also currently not designed to reactivate/reinstate CalFresh expungements. With SCR CA-277821, the system will reactivate ACL/CFL CalFresh replacements due to electronic theft which were issued as cash benefits before or on 11/30/2023 that have since been expunged. Additionally, the TEMP 2313 currently categorizes CalFresh replacements with pay code of **1F** – CalFresh EBT Theft Food Replacement (CT-623) as “CalFresh Federal”. With ACL 24-62E, CalFresh food replacements are no longer federally funded, and these replacements will instead be issued using state funds, as denoted with new benefit type SFRPSN. To more accurately categorize CalFresh replacements and adjustments based on the benefit type and transaction date, CFL 24/25-41 introduces the following new columns: “CFAP/CalFresh State 12/21/24-Current”, “CFAP/CalFresh Federal 12/01/23-12/20/24”, and “CalFresh State 10/29/21-11/30/23”.

The TEMP 2313 needs to be updated to include these reactivated expungements, update the template to remove the “CalFresh Federal” column and to add the three new CalFresh-related columns, and update the logic to accurately categorize CalFresh replacements and adjustments into these new columns accordingly.

2.1.2 TEMP 2313 EBT THEFT – Scam Mockup

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES						
COUNTY REIMBURSEMENT CLAIM FOR ELECTRONIC BENEFIT TRANSFER (EBT) REPLACEMENT DUE TO ELECTRONIC THEFT BY SCAMS - AB 2313 (2018)		County		Date (Month Year)				
		County Name		12/2024				
EBT THEFT BY PROGRAM								
1	Select the Program Name	CalWORKs Cash Assistance	CalFresh Federal	TCVAP Cash Assistance	RCA Cash Assistance	CAPI Cash Assistance	SUAS Cash Assistance	GA/GR Cash Assistance
2	Total reimbursement amount for actual expenditures associated with the theft of EBT cash benefits by scams in current claiming month	\$8,284	\$2,353	\$0	\$0	\$0	\$0	\$2,371
3	Recoveries of Aid for Prior AB 2313 Issuances:	\$0	\$71	\$0	(\$11)	\$0	\$0	\$0
4	Prior Month Positive Adjustments:	\$0	\$292	\$0	\$0	\$0	\$0	\$0
5	Prior Month Negative Adjustments:	\$0	(\$292)	\$0	\$0	\$0	\$0	\$0
6	Total Net Obligations for Reimbursement (Sum Lines #2 and #4, less Line #3 plus Line #5):	\$8,284	\$2,282	\$0	\$11	\$0	\$0	\$2,371
7	Total Number of Payments Issued:	16	9	0	0	0	0	15
COUNTY WELFARE DIRECTOR'S CERTIFICATION I hereby certify, under penalty of perjury, that I am the official responsible for the administration of the public welfare programs in said county; that I have not violated any of the provisions of Sections 1090 to 1096, inclusive, of the Government Code; that the amounts of the aid payments, aid repayments and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the California Department of Social Services.								
Signature of County Welfare Director		Date						
COUNTY AUDITOR'S CERTIFICATION I hereby certify, under penalty of perjury, that I am the officer in aforesaid county responsible for the examination and settlement of accounts; that I have not violated any of the provisions of Sections 1090 to 1096, inclusive, of the Government Code; that the amounts reported herein are in accordance with authorizations for the above-referenced public assistance programs made by the county; that the amounts of the aid payments, aid repayments and adjustments reflected herein have been made according to law and the rules and regulations of the California Department of Social Services.								
Signature of County Auditor		Date						
<div> <div>TEMP 2313 SCAM</div> <div> <div>Issuances</div> <div>Recoveries of Aid</div> <div>Expungements</div> <div>Prior Month Adjustments</div> <div>+</div> </div> </div>								

Figure 2.1.2.1 – TEMP 2313 SCAM sheet – Current template.

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES								
COUNTY REIMBURSEMENT CLAIM FOR ELECTRONIC BENEFIT TRANSFER (EBT) REPLACEMENT DUE TO ELECTRONIC THEFT THEFT BY SCAMS - AB 2313 (2018)		County		Date (Month Year)						
		County Name		03/2025						
EBT THEFT BY PROGRAM										
1	Select the Program Name	CalWORKs Cash Assistance	CalFresh State 10/29/21-11/30/23	TCVAP Cash Assistance	RCA Cash Assistance	CAPI Cash Assistance	SUAS Cash Assistance	GA/GR Cash Assistance	CFAP/CalFresh Federal 12/01/23-12/20/24 (Informational Only)*	CFAP/CalFresh State 12/21/24-Current (Informational Only)**
2	Total reimbursement amount for actual expenditures associated with the theft of EBT cash benefits by scams in current claiming month	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100
3	Recoveries of Aid for Prior AB 2313 issuances:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$1)
4	Prior Month Positive Adjustments:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5	Prior Month Negative Adjustments:	\$0	(\$100)	\$0	\$0	\$0	\$0	\$0	(\$100)	(\$100)
6	Total Net Obligations for Reimbursement (Sum Lines #2 and #4, less Line #3 plus Line #5):	\$0	(\$100)	\$0	\$0	\$0	\$0	\$0	(\$100)	\$1
7	Total Number of Payments Issued:	0	0	0	0	0	0	0	0	1
<p>*Amounts reported in this column will not be reimbursed. Refer to CFL 23/24-55 regarding this change.</p> <p>**Amounts reported in this column will not be reimbursed. Refer to CFL 24/25-41 regarding this change.</p>										
<p>COUNTY WELFARE DIRECTOR'S CERTIFICATION</p> <p>I hereby certify, under penalty of perjury, that I am the official responsible for the administration of the public welfare programs in said county; that I have not violated any of the provisions of Sections 10990 to 10996, inclusive, of the Government Code; that the amounts of the aid payments, aid repayments and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the California Department of Social Services.</p> <p>Signature of County Welfare Director</p>										
<p>TEMP 2313 SCAM Issuances Recoveries of Aid Expungements Prior Month Adjustments + : <</p>										

Figure 2.1.2.2 – TEMP 2313 SCAM sheet – Removed “CalFresh Federal” column and added new CalFresh columns based on CFL 24/25-41.

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

2.1.3 Description of Change

1. Currently, the TEMP 2313 captures transactions which fall under the following criteria:
 - a. The issuance status is either **IS** – Issued or **MI** – Manually Issued.
 - i. **Technical Note:** ISSUANCE_DET.LSTAT_CODE (CT-111)
 - b. The electronic theft type is **SC** – Scam.
 - i. **Technical Note:** ISSUANCE_DET.ELECTR_THFT_TYPE_CODE (CT-10547)
 - c. The issuance type is **EB** – EBT.
 - i. **Technical Note:** CLAIM_HIST.ISSUANCE_TYPE_CODE (CT-112)
 - d. The transaction date occurs during the report month.
 - i. **Technical Note:** CLAIM_HIST.TRANS_DATE
 - e. The transaction type is one of the following:
 - i. **AJ** – Benefit Issuance Adjustment
 - ii. **AX** – Auxiliary Benefit Issuance
 - iii. **EX** – Expunged Benefit
 - iv. **SI** – Supplemental Benefit Issuance
 - v. **Technical Note:** CLAIM_HIST.TRANS_TYPE_CODE (CT-420)
 - f. Transactions fall under one of the following:

Population 1:

 - i. The program is one of the following:
 1. **CL** – Cal-Learn
 2. **CP** – CAPI

3. **CW** – CalWORKs
4. **DV** – Diversion
5. **FS** – CalFresh
6. **GA** – General Assistance/General Relief
7. **GM** – General Assistance (Managed)
8. **GN** – General Assistance (Non-Managed)
9. **GR** – GA/GR Automated Solution
10. **HP** – Homeless – Perm
11. **HT** – Homeless – Temp
12. **IN** – Immediate Need
13. **WT** – Welfare to Work
14. **Technical Note:** CLAIM_HIST.PGM_CODE (CT-18)
- ii. The aid code is **99** – Electronic Theft Replacement Cash Benefit and the pay code is one of the following:
 1. **3T** – CalFresh EBT Theft Replacements
 2. **EO** – Electronic Theft Replacement Cash Benefits
 3. **ET** – Electronic Theft Replacement Cash Benefits
 4. **TB** – Lost/Stolen EBT Benefits
 5. **Technical Note:**
 - a. CLAIM_HIST.AID_CODE (CT-184)
 - b. CLAIM_HIST.PAY_CODE (CT-623)

OR

The pay code is **1F** – CalFresh EBT Theft Food Replacement.

Population 2:

- i. The program is **RC** – RCA.
 1. **Technical Note:** CLAIM_HIST.PGM_CODE (CT-18)
- ii. The aid code is one of the following:
 1. **01** – RCA
 2. **1V** – RCA – TCVAP (State)
 3. **99** – Electronic Theft Replacement Cash Benefit
 4. **R1** – CW – TCVAP (State)
 5. **Technical Note:** CLAIM_HIST.AID_CODE (CT-184)
- iii. The pay code is one of the following:
 1. **EO** – Electronic Theft Replacement Cash Benefits
 2. **ET** – Electronic Theft Replacement Cash Benefits
 3. **TB** – Lost/Stolen EBT Benefits
 4. **Technical Note:** CLAIM_HIST.PAY_CODE (CT-623)
2. Update the logic in the TEMP 2313 to additionally capture transactions which fall under criteria detailed above, but where the following criteria are satisfied:
 - a. The transaction type is **RE** – Reactivated Expunged Benefit.
 - i. **Technical Note:** CLAIM_HIST.TRANS_TYPE_CODE (CT-420)
 - b. In addition to the transaction type, for reactivated expungements where the program is CalFresh, the following criteria are satisfied:
 - i. The pay code is NOT **1F** – CalFresh EBT Theft Food Replacement.
 1. **Technical Note:** CLAIM_HIST.PAY_CODE (CT-623)
 - ii. The issue date of the issued benefit before the transaction became an **EX** – Expunged Benefit is before or on 11/30/2023.

1. **Note:** With CA-277821, CalFresh cash benefits that have since been expunged will be reactivated as a **RE** – Reactivated Expunged Benefit.
2. **Technical Note:**
 - a. CLAIM_HIST.TRANS_TYPE_CODE (CT-420)
 - b. ISSUANCE_DETL.ISSUE_DATE
- c. **Note:** Reactivated expungements should be counted in the Issuances sheet of the TEMP 2313.
3. Update the report template to remove the “CalFresh Federal” column from the **TEMP 2313 SCAM** sheet and add the following columns:
Note: For the following column requirements, transactions should also satisfy the base population as specified above in #1.

Column Name	Column Requirements
CFAP/CalFresh State 12/21/24-Current	<ul style="list-style-type: none"> The program is FS – CalFresh. <ul style="list-style-type: none"> Technical Note: CLAIM_HIST.PGM_CODE (CT-18) The benefit type is SFRPSN. <ul style="list-style-type: none"> Technical Note: ISSUANCE.BEN_TYPE (CT-2055) <p>Note: For the Reporting Column value in the detail sheets, the column name (CFAP/CalFresh State 12/21/24-Current) will be displayed.</p>
CFAP/CalFresh Federal 12/01/23-12/20/24	<ul style="list-style-type: none"> The program is FS – CalFresh. <ul style="list-style-type: none"> Technical Note: CLAIM_HIST.PGM_CODE (CT-18) The benefit type is TFSP or RPSNAP. <ul style="list-style-type: none"> Technical Note: ISSUANCE.BEN_TYPE (CT-2055) <p>Note: For the Reporting Column value in the detail sheets, the column name (CFAP/CalFresh Federal 12/01/23-12/20/24) will be displayed.</p> <ul style="list-style-type: none"> Technical Note: Currently, “-” is displayed as the Reporting Column value if the program is CalFresh but the pay code is NOT 1F – CalFresh EBT Theft Food Replacement. “-” should not be displayed anymore, and “CFAP/CalFresh Federal 12/01/23-12/20/24” should be used instead when the transaction fulfills the criteria above.
CalFresh State 10/29/21-11/30/23	<ul style="list-style-type: none"> The program is FS – CalFresh. <ul style="list-style-type: none"> Technical Note: CLAIM_HIST.PGM_CODE (CT-18)

	<ul style="list-style-type: none"> The benefit type is ETRCB. <ul style="list-style-type: none"> Technical Note: ISSUANCE.BEN_TYPE (CT-2055) <p>Note: For the Reporting Column value in the detail sheets, the column name (CalFresh State 10/29/21-11/30/23) will be displayed.</p> <ul style="list-style-type: none"> Technical Note: Currently, in the Expungements sheet, "-" is displayed as the Reporting Column value if the program is CalFresh but the pay code is NOT 1F – CalFresh EBT Theft Food Replacement. "-" should not be displayed anymore, and "CalFresh State 10/29/21-11/30/23" should be used instead when the transaction fulfills the criteria above.
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- a. Update the logic for the detail sheets to remove the existing "CalFresh" category for the Reporting Column, and add the three new CalFresh categories to the logic based on the requirements and notes in #3.
 - i. **Note:** See [Appendix Item 4.1](#) for examples on how these transactions are reported in the detail sheets.

2.1.4 Report Location

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

2.1.5 Counties Impacted

All counties will be impacted by the changes outlined in this SCR.

2.1.6 Security Updates

1. Security Rights

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

2. Security Groups

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

2.1.7 Report Usage/Performance

No significant changes in report usage or performance are expected.

2.2 TEMP 2035 EBT THEFT – Skimming

2.2.1 Overview

The TEMP 2035 EBT THEFT – Skimming is a monthly scheduled state report which provides reimbursement claim information for EBT replacements due to electronic theft by skimming. Currently, the TEMP 2035 does not report on any cash reactivated expungements. The CalSAWS system is also currently not designed to reactivate/reinstate CalFresh expungements. With SCR CA-277821, the system will reactivate ACL/CFL CalFresh replacements due to electronic theft which were issued as cash benefits before or on 11/30/2023 that have since been expunged. Additionally, the TEMP 2035 currently categorizes CalFresh replacements with pay code of **1F** – CalFresh EBT Theft Food Replacement (CT-623) as “CalFresh Federal”. With ACL 24-62E, CalFresh food replacements are no longer federally funded, and these replacements will instead be provided using state funds, as denoted with new benefit type SFRPSN. To more accurately categorize CalFresh replacements and adjustments based on the benefit type and transaction date, CFL 24/25-41 introduces the following new columns: “CFAP/CalFresh State 12/21/24-Current”, “CFAP/CalFresh Federal 12/01/23-12/20/24”, and “CalFresh State 10/29/21-11/30/23”.

The TEMP 2035 needs to be updated to include these reactivated expungements, update the template to remove the “CalFresh Federal” column and to add the three new CalFresh-related columns, and update the logic to accurately categorize CalFresh replacements and adjustments into these new columns accordingly.

2.2.2 TEMP 2035 EBT THEFT – Skimming Mockup

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES						
COUNTY REIMBURSEMENT CLAIM FOR ELECTRONIC BENEFIT TRANSFER (EBT) REPLACEMENT DUE TO ELECTRONIC THEFT THEFT BY SKIMMING - AB 2035 (2012)		County		Date (Month Year)				
		County Name		11/2024				
EBT THEFT BY PROGRAM								
1	Select the Program Name	CalWORKs Cash Assistance	CalFresh Federal	TCVAP Cash Assistance	RCA Cash Assistance	CAPI Cash Assistance	SUAS Cash Assistance	GA/GR Cash Assistance
2	Total reimbursement amount for actual expenditures associated with the theft of EBT cash benefits by skimming in current claiming month	\$734,134	\$315,384	\$0	\$680	\$530	\$40	\$0
3	Recoveries of Aid for Prior AB 2035 issuances:	\$863	\$388	\$0	\$0	\$0	\$0	\$0
4	Prior Month Positive Adjustments:	\$0	\$2,524	\$0	\$0	\$0	\$0	\$0
5	Prior Month Negative Adjustments:	\$0	(\$2,524)	\$0	\$0	\$0	\$0	\$0
6	Total Net Obligations for Reimbursement (Sum Lines #2 and #4, less Line #3 plus Line #5):	\$733,271	\$314,996	\$0	\$680	\$530	\$40	\$0
7	Total Number of Payments Issued:	852	899	0	1	1	3	0
COUNTY WELFARE DIRECTOR'S CERTIFICATION I hereby certify, under penalty of perjury, that I am the official responsible for the administration of the public welfare programs in said county; that I have not violated any of the provisions of Sections 1090 to 1096, inclusive, of the Government Code; that the amounts of the aid payments, aid repayments and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the California Department of Social Services.								
Signature of County Welfare Director		Date						
COUNTY AUDITOR'S CERTIFICATION I hereby certify, under penalty of perjury, that I am the officer in aforesaid county responsible for the examination and settlement of accounts; that I have not violated any of the provisions of Sections 1090 to 1096, inclusive, of the Government Code; that the amounts reported herein are in accordance with authorizations for the above-referenced public assistance programs made by the county; that the amounts of the aid payments, aid repayments and adjustments reflected herein have been made according to law and the rules and regulations of the California Department of Social Services.								
Signature of County Auditor		Date						
TEMP 2035 Skimming Issuances Recoveries of Aid Expungements Prior Month Adjustments +								

Figure 2.2.2.1 – TEMP 2035 Skimming sheet – Current template.

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY		CALIFORNIA DEPARTMENT OF SOCIAL SERVICES	
COUNTY REIMBURSEMENT CLAIM FOR ELECTRONIC BENEFIT TRANSFER (EBT) REPLACEMENT DUE TO ELECTRONIC THEFT BY SKIMMING - AB 2035 (2012)		County	Date (Month Year)
		County Name	03/2025
EBT THEFT BY PROGRAM			
1 Select the Program Name	CalWORKs Cash Assistance	CalFresh State 10/29/21-11/30/23	TCVAP Cash Assistance
2 Total reimbursement amount for actual expenditures associated with the theft of EBT cash benefits by skimming in current claiming month	\$0	\$0	\$0
3 Recoveries of Aid for Prior AB 2035 issuances:	\$0	\$0	\$0
4 Prior Month Positive Adjustments:	\$0	\$0	\$0
5 Prior Month Negative Adjustments:	\$0	(\$100)	\$0
6 Total Net Obligations for Reimbursement (Sum Lines #2 and #4, less Line #3 plus Line #5):	\$0	(\$100)	\$0
7 Total Number of Payments Issued:	0	0	0
<p>*Amounts reported in this column will not be reimbursed. Refer to CFL 23/24-55 regarding this change.</p> <p>**Amounts reported in this column will not be reimbursed. Refer to CFL 24/25-41 regarding this change.</p>			
<p>COUNTY WELFARE DIRECTOR'S CERTIFICATION</p> <p>I hereby certify, under penalty of perjury, that I am the official responsible for the administration of the public welfare programs in said county; that I have not violated any of the provisions of Sections 1090 to 1096, inclusive, of the Government Code; that the amounts of the aid payments, aid repayments and adjustments reflected herein have been made in accordance with all provisions of the Welfare and Institutions Code and the rules and regulations of the California Department of Social Services.</p> <p>Signature of County Welfare Director _____ Date _____</p>			
TEMP 2035 Skimming			

Figure 2.2.2.2 – TEMP 2035 Skimming sheet – Removed “CalFresh Federal” column and added new CalFresh columns based on CFL 24/25-41.

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

2.2.3 Description of Change

1. Currently, the TEMP 2035 captures transactions which fall under the following criteria:

- The issuance status is either **IS** – Issued or **MI** – Manually Issued.
 - Technical Note:** ISSUANCE_DETL.STAT_CODE (CT-111)
- The electronic theft type is **SK** – Skimming.
 - Technical Note:** ISSUANCE_DETL.ELECTR_THFT_TYPE_CODE (CT-10547)
- The issuance type is **EB** – EBT.
 - Technical Note:** CLAIM_HIST.ISSUANCE_TYPE_CODE (CT-112)
- The transaction date occurs during the report month.
 - Technical Note:** CLAIM_HIST.TRANS_DATE
- The transaction type is one of the following:
 - AJ** – Benefit Issuance Adjustment
 - AX** – Auxiliary Benefit Issuance
 - EX** – Expunged Benefit
 - SI** – Supplemental Benefit Issuance
 - Technical Note:** CLAIM_HIST.TRANS_TYPE_CODE (CT-420)
- Transactions fall under one of the following:

Population 1:

- The program is one of the following:
 - CL** – Cal-Learn

2. **CP** – CAPI
3. **CW** – CalWORKs
4. **DV** – Diversion
5. **FS** – CalFresh
6. **GA** – General Assistance/General Relief
7. **GM** – General Assistance (Managed)
8. **GN** – General Assistance (Non-Managed)
9. **GR** – GA/GR Automated Solution
10. **HP** – Homeless – Perm
11. **HT** – Homeless – Temp
12. **IN** – Immediate Need
13. **WT** – Welfare to Work
14. **Technical Note:** CLAIM_HIST.PGM_CODE (CT-18)
- ii. The aid code is **99** – Electronic Theft Replacement Cash Benefit and the pay code is one of the following:
 1. **3T** – CalFresh EBT Theft Replacements
 2. **EO** – Electronic Theft Replacement Cash Benefits
 3. **ET** – Electronic Theft Replacement Cash Benefits
 4. **TB** – Lost/Stolen EBT Benefits
 5. **Technical Note:**
 - a. CLAIM_HIST.AID_CODE (CT-184)
 - b. CLAIM_HIST.PAY_CODE (CT-623)

OR

The pay code is **1F** – CalFresh EBT Theft Food Replacement.

Population 2:

- i. The program is **RC** – RCA.
 1. **Technical Note:** CLAIM_HIST.PGM_CODE (CT-18)
- ii. The aid code is one of the following:
 1. **01** – RCA
 2. **1V** – RCA – TCVAP (State)
 3. **99** – Electronic Theft Replacement Cash Benefit
 4. **R1** – CW – TCVAP (State)
 5. **Technical Note:** CLAIM_HIST.AID_CODE (CT-184)
- iii. The pay code is one of the following:
 1. **EO** – Electronic Theft Replacement Cash Benefits
 2. **ET** – Electronic Theft Replacement Cash Benefits
 3. **TB** – Lost/Stolen EBT Benefits
 4. **Technical Note:** CLAIM_HIST.PAY_CODE (CT-623)
2. Update the logic in the TEMP 2035 to additionally capture transactions which fall under criteria detailed above, but where the following criteria are satisfied:
 - a. The transaction type is **RE** – Reactivated Expunged Benefit.
 - i. **Technical Note:** CLAIM_HIST.TRANS_TYPE_CODE (CT-420)
 - b. In addition to the transaction type, for reactivated expungements where the program is CalFresh, the following criteria are satisfied:
 - i. The pay code is NOT **1F** – CalFresh EBT Theft Food Replacement.
 1. **Technical Note:** CLAIM_HIST.PAY_CODE (CT-623)

- ii. The issue date of the issued benefit before the transaction became an **EX** – Expunged Benefit is before or on 11/30/2023.
 1. **Note:** With CA-277821, CalFresh cash benefits that have since been expunged will be reactivated as a **RE** – Reactivated Expunged Benefit.
 2. **Technical Note:**
 - a. CLAIM_HIST.TRANS_TYPE_CODE (CT-420)
 - b. ISSUANCE_DETL.ISSUE_DATE
 - c. **Note:** Reactivated expungements should be counted in the Issuances sheet of the TEMP 2035.
3. Update the report template to remove the “CalFresh Federal” column from the **TEMP 2035 Skimming** sheet and add the following columns:
Note: For the following column requirements, transactions should also satisfy the base population as specified above in #1.

Column Name	Column Requirements
CFAP/CalFresh State 12/21/24-Current	<ul style="list-style-type: none"> The program is FS – CalFresh. <ul style="list-style-type: none"> Technical Note: CLAIM_HIST.PGM_CODE (CT-18) The benefit type is SFRPSN. <ul style="list-style-type: none"> Technical Note: ISSUANCE.BEN_TYPE (CT-2055) <p>Note: For the Reporting Column value in the detail sheets, the column name (CFAP/CalFresh State 12/21/24-Current) will be displayed.</p>
CFAP/CalFresh Federal 12/01/23-12/20/24	<ul style="list-style-type: none"> The program is FS – CalFresh. <ul style="list-style-type: none"> Technical Note: CLAIM_HIST.PGM_CODE (CT-18) The benefit type is TFSP or RPSNAP. <ul style="list-style-type: none"> Technical Note: ISSUANCE.BEN_TYPE (CT-2055) <p>Note: For the Reporting Column value in the detail sheets, the column name (CFAP/CalFresh Federal 12/01/23-12/20/24) will be displayed.</p> <ul style="list-style-type: none"> Technical Note: Currently, “-” is displayed as the Reporting Column value if the program is CalFresh but the pay code is NOT 1F – CalFresh EBT Theft Food Replacement. “-” should not be displayed anymore, and “CFAP/CalFresh Federal 12/01/23-12/20/24” should be used instead when the transaction fulfills the criteria above.

CalFresh State 10/29/21 - 11/30/23	<ul style="list-style-type: none"> The program is FS – CalFresh. <ul style="list-style-type: none"> Technical Note: CLAIM_HIST.PGM_CODE (CT-18) The benefit type is ETRCB. <ul style="list-style-type: none"> Technical Note: ISSUANCE.BEN_TYPE (CT-2055) <p>Note: For the Reporting Column value in the detail sheets, the column name (CalFresh State 10/29/21-11/30/23) will be displayed.</p> <ul style="list-style-type: none"> Technical Note: Currently, in the Expungements sheet, “-” is displayed as the Reporting Column value if the program is CalFresh but the pay code is NOT 1F – CalFresh EBT Theft Food Replacement. “-” should not be displayed anymore, and “CalFresh State 10/29/21-11/30/23” should be used instead when the transaction fulfills the criteria above.
---	---

- a. Update the logic for the detail sheets to remove the existing “CalFresh” category for the Reporting Column, and add the three new CalFresh categories to the logic based on the requirements and notes in #3.
 - i. **Note:** See [Appendix Item 4.1](#) for examples on how these transactions are reported in the detail sheets.

2.2.4 Report Location

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

2.2.5 Counties Impacted

All counties will be impacted by the changes outlined in this SCR.

2.2.6 Security Updates

1. Security Rights

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

2. Security Groups



Security Group	Group Description	Group to Role Mapping
----------------	-------------------	-----------------------

N/A	N/A	N/A
-----	-----	-----

2.2.7 Report Usage/Performance

No significant changes in report usage or performance are expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	TEMP 2313 EBT THEFT – Scam Mockup	 TEMP 2313 EBT THEFT - Scam Mockup
2	Reports	TEMP 2035 EBT THEFT – Skimming Mockup	 TEMP 2035 EBT THEFT - Skimming Mc

4 APPENDIX

4.1 Examples of CalFresh Replacements in Detail Sheets

CalSAWS TEMP 2313 - Scam														
County Name														
Report Month: 03/2025														
Run Date: APR-09-25 10:25 AM														
Issuances														Summary
Totals										Issuances:		1		Amount:
														\$0.00
Reporting Column	Program	Transaction Type	Benefit Type	Object	Department Object	Case Number	Case Name	Payee Name	Control Number	Benefit Month	Availability Date	Transaction Date	Authorizing Worker ID	Amount
CFAP/CalFresh State 12/21/24-Current	CalFresh	Supplemental Benefit Issuance	SFRPSN	-	-	-	-	-	-	-	-	3/3/2025	-	-

Figure 4.1.1 – Issuances sheet – Example record where the reporting column is “CFAP/CalFresh State 12/21/24-Current”.

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

CalSAWS TEMP 2313 - Scam														
County Name														
Report Month: 03/2025														
Run Date: APR-09-25 10:25 AM														
Expungements														Summary
Totals										Expungements:		1		Amount:
														(\$1.00)
Reporting Column	Program	Benefit Type	Object	Department Object	Case Number	Case Name	Payee Name	Control Number	Benefit Month	Availability Date	Transaction Date	Authorizing Worker ID	Amount	(\$1.00)
CFAP/CalFresh State 12/21/24-Current	-	-	-	-	-	-	-	-	-	-	3/4/2025	-	-	(\$1.00)

Figure 4.1.2 – Expungements sheet – Example record where the reporting column is “CFAP/CalFresh State 12/21/24-Current”.

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

CalSAWS TEMP 2313 - Scam													
County Name													
Report Month: 03/2025													
Run Date: APR-03-25 10:25 AM													
Prior Month Adjustments													Summary
Totals													
Adjustments:								3	Amount:		(\$300.00)		
Reporting Column	Program	Object	Department Object	Case Number	Case Name	Payee Name	Adjustment Type	Control Number	Benefit Month	Availability Date	Transaction Date	Authorizing Worker ID	Amount
CalFresh State 10/29/21-11/30/23	CalFresh	-	-	-	-	-	Negative	-	-	-	3/7/2025 -	-	(100.00)
CFAP/CalFresh Federal 12/01/23-12/20/24	CalFresh	-	-	-	-	-	Negative	-	-	-	3/8/2025 -	-	(100.00)
CFAP/CalFresh State 12/21/24-Current	CalFresh	-	-	-	-	-	Negative	-	-	-	3/9/2025 -	-	(100.00)

Figure 4.1.3 – Prior Month Adjustments sheet – Example records where the reporting column is “CFAP/CalFresh State 12/21/24-Current”, “CFAP/CalFresh Federal 12/01/23-12/20/24”, or “CalFresh State 10/29/21-11/30/23”.

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

Figure 4.1.1 shows an example of a CalFresh replacement with the new benefit type of SFRPSN, hence the Reporting Column value being “CFAP/CalFresh State 12/21/24-Current”. Examples of a transaction with this Reporting Column value is also shown in the Expungements sheet when the transaction type is **EX** – Expunged Benefit (CT-420) as seen in Figure 4.1.2, and the Prior Month Adjustments sheet when the transaction type is **AJ** – Benefit Issuance Adjustment (CT-420) as seen in Figure 4.1.3.

Figure 4.1.3 also shows other examples of CalFresh transactions in the Prior Month Adjustments sheet with the Report Column value of “CalFresh State 10/29/21-11/30/23” and “CFAP/CalFresh Federal 12/01/23-12/20/24”. In these examples, the benefit type would be ETRCB or TFSP/RPSNAP, respectively.

Design

CA-284176

Update Learning Disability Evaluation Result Detail to
Limit Max Characters

DOCUMENT APPROVAL HISTORY

Prepared By

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Reviewed By

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DATE

VERSION

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AUTHOR

3/3/2025

1.0

Initial

Andrea
Rodriguez

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CA-284176 – Update Learning Disability Evaluation Result Detail to Limit Max Characters

1 OVERVIEW

1.1 Current Design

The Learning Disability Evaluation Result Detail page allows the user to be able to successfully save a maximum amount of 400 characters on each description text field of the Evaluation Test section. However, there is no validation on the page when a user inputs more than 400 characters.

1.2 Requests

Create save validations to prevent save errors when the user enters more than 400 characters on any of the description text fields found under the Evaluation Test section on the Learning Disability Evaluation Result Detail page.

Apply accessibility updates to ensure that Accessibility Standards are met on the Learning Disability Evaluation Result Detail page.

1.3 Overview of Recommendations

1. Create save validations on the Evaluation Description text fields to ensure that the maximum characters allowed is 400.
2. Update the Evaluation Test table headers to have discernible text for each field column in order to meet Accessibility Standards.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically stated by this design document.

2 RECOMMENDATIONS

2.1 Learning Disability Evaluation Result Detail

2.1.1 Overview

The Learning Disability Evaluation Result Detail page allows the user to record learning disability evaluations. Validations will be added to limit the evaluation description text fields to 400 characters upon saving. The Evaluation Test table will be updated to include header text for all fields to meet Accessibility Standards.

2.1.2 Learning Disability Evaluation Result Detail Mockup

Learning Disability Evaluation Result Detail

*- Indicates required fields

Save and Return

Cancel

- **Evaluation Description** - The Evaluation Description for the Achievement Evaluation Test cannot be more than 400 characters.
- **Evaluation Description** - The Evaluation Description for the Information Processing Evaluation Test cannot be more than 400 characters.

Name:

Doe, Jane 25F

Appointment Status: *

Yes

Type: *

Full

Evaluation Test	Evaluation Indicator	Evaluation Description
Achievement	Yes	Sample Achievement Evaluation Description Text Sample Achievement Evaluation Description Text
Aptitude	Yes	Sample Aptitude Evaluation Description Text
Information Processing	Yes	Sample Information Processing Evaluation Description Text Sample Information Processing Evaluati
Other	Yes	Sample Other Evaluation Description Text
Vocational Assessment		

Figure 2.1.1 – Learning Disability Evaluation Result Detail page excerpt displaying validation messages for the evaluation descriptions of the “Achievement” and “Information Processing” evaluation tests.

2.1.3 Description of Changes

1. Create save validations that will apply a 400-character limit on the Evaluation Description text field for each of the Evaluation Tests.
 - a. A validation will display for each Evaluation Description containing more than 400 characters upon saving.
 - i. Each special/accented character (Ex: é) should count as one character.

Note: Punctuation, spaces, and line breaks also count toward the maximum character limit.

- b. The validation will display the following message “Evaluation Description – The Evaluation Description for the [Test Name] Evaluation Test cannot be more than 400 characters.” (as shown in Figure 2.1.1).
 - i. “Evaluation Description” will be a hyperlink to set the focus to the text field that contains more than 400 characters.
 - ii. “[Test Name]” will display the name of the evaluation test that corresponds to the description field containing more than 400 characters.
2. Update the Evaluation Test table header to have discernible text for each field column to meet Accessibility Standards.
 - a. The header for the first column will be titled “Evaluation Test.”
 - b. The header for the second column will be titled “Evaluation Indicator.”
 - c. The header for the third column will be titled “Evaluation Description.”

2.1.4 Page Location

- **Global:** Empl. Services
- **Local:** Case Summary
- **Task:** Assessment Results

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Create page mapping for the Learning Disability Evaluation Result Detail page.

2.1.7 Accessibility

- The following Accessibility Enhancements have been identified.
- Table header text should not be empty.

2.1.8 Page Usage/Data Volume Impacts

N/A

Design

CA-284315

Update NOAs and Forms for removal of Obsoleted Program references

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Justin Bourbonniere	
	Reviewed By	Raj Devidi, Cathy Vaisau, Chitra Barsagade, Sunitha Sampathkumar	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01/09/2025	1.0	Initial Draft	Justin Bourbonniere
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02/25/2025	1.3	BA Review feedback	Justin Bourbonniere
03/18/2025	1.4	Committee Review Feedback	Justin Bourbonniere
03/21/2025	1.5	Committee Review Feedback	Justin Bourbonniere

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CA-284315 – Update NOAs and Forms for removal of Obsoleted Program references

1 OVERVIEW

This effort will update NOAs and Forms to remove obsoleted program references.

1.1 Current Design

SCR CA-275300 updated Eligibility logic to no longer exempt participants who are enrolled in 'Title IV Funded JOBS Program' as per ACL 24-31, 'Title IV Funded JOBS Program' no longer exists.

1.2 Requests

Remove any references to the Title IV Funded JOBS Program from all Forms and NOAs.

Remove references of the below student exemptions from the NOAs/Forms as they are obsolete:

- Extended Opportunity Programs and Services (EOPS)
- Unaccompanied Refugee Minors (URM) Program
- Educational Opportunity Program (EOP)
- Guardian Scholars Program
- Student Academic Services (SAS)
- Foster Youth Success Initiative (FYSI)
- Cooperative Agencies Resources for Education (CARE) Program
- Cooperating Agencies Foster Youth Educational Support (CAFYES)
- McNair Scholars Program
- Chafee Education and Training Voucher (ETV) Program
- Mathematics, Engineering, Science Achievement (MESA) Program
- Extended Foster Care (AB 12/AB 212)
- Puente Project

1.3 Overview of Recommendations

1. Remove JOBS reference from the CF - BC - INELIGIBLE STUDENT reason fragment (Fragment ID: 6018).
2. Remove JOBS reference from the CF - DE - INELIGIBLE STUDENT reason fragment (Fragment ID: 6019).
3. Remove JOBS reference from the CF - DS - INELIGIBLE STUDENT reason fragment (Fragment ID: 6020).
4. Remove JOBS reference from the CF - DE - FAILED RECERT PROCESS reason fragment (Fragment ID: 7805).
5. Remove JOBS reference from the CF - AP - INELIGIBLE STUDENT reason fragment (Fragment ID: 6017).

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Remove JOBS reference from the CF - BC - INELIGIBLE STUDENT reason fragment

2.1.1 Overview

This effort will update the NOA verbiage for the CF - BC – INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6018).

Reason Fragment Name and ID: CF_CH_INELIG_STUD_F017 (Fragment ID: 6018)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Change

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

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

2.1.2 NOA Verbiage

Update CF - BC – INELIGIBLE STUDENT Fragment XDP

This effort will update the NOA verbiage for the CF - BC – INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6018).

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

EXISTING TEXT	UPDATED TEXT
<PERSON> Is/are no longer eligible student. To be an eligible student, the student must meet at least one of the following conditions:	<Person> Is/are no longer an eligible student. To be an eligible student, the student must meet at least one of the following conditions:

EXISTING TEXT	UPDATED TEXT
<ul style="list-style-type: none"> - The student works 20 hours a week and is paid minimum wage. - The student is in a college work study program paid for by the Federal government. - The student is a parent or guardian of a child under age 6. - The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care. - The student gets CalWORKs. - The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government. - The student is a single parent caring for a child under 12 and goes to school full time. 	<ul style="list-style-type: none"> - The student does not expect to be enrolled next term. - The student is age 17 or younger or is age 50 or older. - The student is disabled or physically or mentally unable to work. - The student is enrolled less than half-time. - The student gets CalWORKs, Tribal TANF, TANF-funded Cal Grant A or B (in the last 12 months) or any other TANF-funded program. - The student is paid for working an average of 20 hours a week or 80 hours a month or is self-employed working an average of 20 hours a week or 80 hours a month and is paid an amount equal to federal minimum wage. - The student is approved for a college work study program paid for by the State or Federal government and anticipates working during the term. - The student has parental control of a child under age 6. - The student has parental control of a child age 6 to under age 12 and cannot work an average of 20 hours per week or an average of 80 hours per month or be in a work study program because the student cannot get child care. - The student is a single parent caring for a child under 12 and goes to school full time. - The student is participating in one of the following: <ul style="list-style-type: none"> - CalFresh Employment and Training (E&T), - Workforce Innovation and Opportunity Act (WIOA), - On-the-job (OTJ) training program, - Program under Section 236 of the Trade Act of 1974, - A training program paid for by the state or local government, or - An approved Local Program that Increases Employability (LPIE). See the full List of Approved LPIEs (www.cdss.ca.gov/inforesources/calfresh-resource-center/policy).

2.1.3 NOA Variable Population

There are no changes to this section.

2.1.4 NOA Generation Conditions

There are no changes to this section.

2.2 Remove JOBS reference from the CF - DE - INELIGIBLE STUDENT reason fragment

2.2.1 Overview

This effort will update the NOA verbiage for the CF - DE - INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6019).

Reason Fragment Name and ID: CF_DN_INELIG_STUD_F017 (Fragment ID: 6019)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

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

2.2.2 NOA Verbiage

Update CF - DE - INELIGIBLE STUDENT Fragment XDP

This effort will update the NOA verbiage for the CF - DE - INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6019).

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

EXISTING TEXT	UPDATED TEXT
<PERSON> Is an ineligible student. To be an eligible student, the student must meet at least one of the following conditions:	<Person> is an ineligible student. To be an eligible student, the student must meet at least one of the following conditions:

EXISTING TEXT	UPDATED TEXT
<ul style="list-style-type: none"> - The student works 20 hours a week and is paid minimum wage. - The student is in a college work study program paid for by the Federal government. - The student is a parent or guardian of a child under age 6. - The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care. - The student gets CalWORKs. - The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government. - The student is a single parent caring for a child under 12 and goes to school full time. 	<ul style="list-style-type: none"> - The student does not expect to be enrolled next term. - The student is age 17 or younger or is age 50 or older. - The student is disabled or physically or mentally unable to work. - The student is enrolled less than half-time. - The student gets CalWORKs, Tribal TANF, TANF-funded Cal Grant A or B (in the last 12 months) or any other TANF-funded program. - The student is paid for working an average of 20 hours a week or 80 hours a month or is self-employed working an average of 20 hours a week or 80 hours a month and is paid an amount equal to federal minimum wage. - The student is approved for a college work study program paid for by the State or Federal government and anticipates working during the term. - The student has parental control of a child under age 6. - The student has parental control of a child age 6 to under age 12 and cannot work an average of 20 hours per week or an average of 80 hours per month or be in a work study program because the student cannot get child care. - The student is a single parent caring for a child under 12 and goes to school full time. - The student is participating in one of the following: <ul style="list-style-type: none"> - CalFresh Employment and Training (E&T), - Workforce Innovation and Opportunity Act (WIOA), - On-the-job (OTJ) training program, - Program under Section 236 of the Trade Act of 1974, - A training program paid for by the state or local government, or - An approved Local Program that Increases Employability (LPIE). See the full List of Approved LPIEs (www.cdss.ca.gov/inforesources/calfresh-resource-center/policy).

2.2.3 NOA Variable Population

There are no changes to this section.

2.2.4 NOA Generation Conditions

There are no changes to this section.

2.3 Remove JOBS reference from the CF - DS - INELIGIBLE STUDENT reason fragment

2.3.1 Overview

This effort will update the NOA verbiage for the CF - DS - INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6020).

Reason Fragment Name and ID: CF_TN_INELIG_STUDNT_F017 (Fragment ID: 6020)

State Form/NOA: CF 377.4 SAR (6/13)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Termination

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

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

2.3.2 NOA Verbiage

Update CF - DS - INELIGIBLE STUDENT Fragment XDP

This effort will update the NOA verbiage for the CF - DS - INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6020).

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

EXISTING TEXT	UPDATED TEXT
<PERSON> Is/are no longer eligible student. To be an eligible student, the student must meet at least one of the following conditions:	<Person> Is/are no longer an eligible student. To be an eligible student, the student must meet at least one of the following conditions:

EXISTING TEXT	UPDATED TEXT
<ul style="list-style-type: none"> - The student works 20 hours a week and is paid minimum wage. - The student is in a college work study program paid for by the Federal government. - The student is a parent or guardian of a child under age 6. - The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care. - The student gets CalWORKs. - The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government. - The student is a single parent caring for a child under 12 and goes to school full time. 	<ul style="list-style-type: none"> - The student does not expect to be enrolled next term. - The student is age 17 or younger or is age 50 or older. - The student is disabled or physically or mentally unable to work. - The student is enrolled less than half-time. - The student gets CalWORKs, Tribal TANF, TANF-funded Cal Grant A or B (in the last 12 months) or any other TANF-funded program. - The student is paid for working an average of 20 hours a week or 80 hours a month or is self-employed working an average of 20 hours a week or 80 hours a month and is paid an amount equal to federal minimum wage. - The student is approved for a college work study program paid for by the State or Federal government and anticipates working during the term. - The student has parental control of a child under age 6. - The student has parental control of a child age 6 to under age 12 and cannot work an average of 20 hours per week or an average of 80 hours per month or be in a work study program because the student cannot get child care. - The student is a single parent caring for a child under 12 and goes to school full time. - The student is participating in one of the following: <ul style="list-style-type: none"> - CalFresh Employment and Training (E&T), - Workforce Innovation and Opportunity Act (WIOA), - On-the-job (OTJ) training program, - Program under Section 236 of the Trade Act of 1974, - A training program paid for by the state or local government, or - An approved Local Program that Increases Employability (LPIE). See the full List of Approved LPIEs (www.cdss.ca.gov/inforesources/calfresh-resource-center/policy).

2.3.3 NOA Variable Population

There are no changes to this section.

2.3.4 NOA Generation Conditions

There are no changes to this section.

2.4 Remove JOBS reference from the CF - DE - FAILED RECERT PROCESS reason fragment

2.4.1 Overview

This effort will update the NOA verbiage for the CF - DE - FAILED RECERT PROCESS reason fragment to remove the reference to the JOBS program (Fragment ID: 7805).

Reason Fragment Name and ID: CF_DN_RE_INELIG_STUD_F929D (Fragment ID: 7805)

State Form/NOA: CF 377.1A (08/21)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Denial

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

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

2.4.2 NOA Verbiage

Update CF - DE - FAILED RECERT PROCESS Fragment XDP

This effort will update the NOA verbiage for the CF - DE - FAILED RECERT PROCESS reason fragment to remove the reference to the JOBS program (Fragment ID: 7805).

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

EXISTING TEXT	UPDATED TEXT
<PERSON> Is/are no longer eligible student. To be an eligible student, the student must meet at least one of the following conditions:	<Person> Is/are no longer an eligible student. To be an eligible student, the student must meet at least one of the following conditions:

EXISTING TEXT	UPDATED TEXT
<ul style="list-style-type: none"> - The student works 20 hours a week and is paid minimum wage. - The student is in a college work study program paid for by the Federal government. - The student is a parent or guardian of a child under age 6. - The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care. - The student gets CalWORKs. - The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government. - The student is a single parent caring for a child under 12 and goes to school full time. 	<ul style="list-style-type: none"> - The student does not expect to be enrolled next term. - The student is age 17 or younger or is age 50 or older. - The student is disabled or physically or mentally unable to work. - The student is enrolled less than half-time. - The student gets CalWORKs, Tribal TANF, TANF-funded Cal Grant A or B (in the last 12 months) or any other TANF-funded program. - The student is paid for working an average of 20 hours a week or 80 hours a month or is self-employed working an average of 20 hours a week or 80 hours a month and is paid an amount equal to federal minimum wage. - The student is approved for a college work study program paid for by the State or Federal government and anticipates working during the term. - The student has parental control of a child under age 6. - The student has parental control of a child age 6 to under age 12 and cannot work an average of 20 hours per week or an average of 80 hours per month or be in a work study program because the student cannot get child care. - The student is a single parent caring for a child under 12 and goes to school full time. - The student is participating in one of the following: <ul style="list-style-type: none"> - CalFresh Employment and Training (E&T), - Workforce Innovation and Opportunity Act (WIOA), - On-the-job (OTJ) training program, - Program under Section 236 of the Trade Act of 1974, - A training program paid for by the state or local government, or - An approved Local Program that Increases Employability (LPIE). See the full List of Approved LPIEs (www.cdss.ca.gov/inforesources/calfresh-resource-center/policy).

2.4.3 NOA Variable Population

There are no changes to this section.

2.4.4 NOA Generation Conditions

There are no changes to this section.

2.5 Remove JOBS reference from the CF - AP - INELIGIBLE STUDENT reason fragment

2.5.1 Overview

This effort will update the NOA verbiage for the CF - AP - INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6017).

Reason Fragment Name and ID: CF_AP_INELIG_STUD_F017 (Fragment ID: 6017)

State Form/NOA: CF 377.1 (2/13)

Current NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Current Program(s): CalFresh

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Includes NA Back 9: Yes

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

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

2.5.2 NOA Verbiage

Update CF - AP - INELIGIBLE STUDENT Fragment XDP

This effort will update the NOA verbiage for the CF - AP - INELIGIBLE STUDENT reason fragment to remove the reference to the JOBS program (Fragment ID: 6017).

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

EXISTING TEXT	UPDATED TEXT
<PERSON> Is/are no longer eligible student. To be an eligible student, the student must meet at least one of the following conditions:	<Person> is an ineligible student To be an eligible student, the student must meet at least one of the following conditions:

EXISTING TEXT	UPDATED TEXT
<ul style="list-style-type: none"> - The student works 20 hours a week and is paid minimum wage. - The student is in a college work study program paid for by the Federal government. - The student is a parent or guardian of a child under age 6. - The student is a parent or guardian of a child age 6 to 12 and cannot work 20 hours a week or be in a work study program because the student cannot get child care. - The student gets CalWORKs. - The student goes to school through JTPA, E&T, JOBS, a program under the Trade Act of 1974, or a training program paid for by the state or local government. - The student is a single parent caring for a child under 12 and goes to school full time. 	<ul style="list-style-type: none"> - The student does not expect to be enrolled next term. - The student is age 17 or younger or is age 50 or older. - The student is disabled or physically or mentally unable to work. - The student is enrolled less than half-time. - The student gets CalWORKs, Tribal TANF, TANF-funded Cal Grant A or B (in the last 12 months) or any other TANF-funded program. - The student is paid for working an average of 20 hours a week or 80 hours a month or is self-employed working an average of 20 hours a week or 80 hours a month and is paid an amount equal to federal minimum wage. - The student is approved for a college work study program paid for by the State or Federal government and anticipates working during the term. - The student has parental control of a child under age 6. - The student has parental control of a child age 6 to under age 12 and cannot work an average of 20 hours per week or an average of 80 hours per month or be in a work study program because the student cannot get child care. - The student is a single parent caring for a child under 12 and goes to school full time. - The student is participating in one of the following: <ul style="list-style-type: none"> - CalFresh Employment and Training (E&T), - Workforce Innovation and Opportunity Act (WIOA), - On-the-job (OTJ) training program, - Program under Section 236 of the Trade Act of 1974, - A training program paid for by the state or local government, or - An approved Local Program that Increases Employability (LPIE). See the full List of Approved LPIEs (www.cdss.ca.gov/inforesources/calfresh-resource-center/policy).

2.5.3 NOA Variable Population

There are no changes to this section.

2.5.4 NOA Generation Conditions

There are no changes to this section.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
#1	Client Correspondence	CF_CH_INELIG_STUD_F017 mockup	CF_CH_INELIG_STUD_F017 mockup.pdf
#2	Client Correspondence	CF_DN_INELIG_STUD_F017 mockup	CF_DN_INELIG_STUD_F017 mockup.pdf
#3	Client Correspondence	CF_TN_INELIG_STUD_F017 mockup	CF_TN_INELIG_STUD_F017 mockup.pdf
#4	Client Correspondence	CF_DN_RE_INELIG_STUD_F929D mockup	CF_DN_RE_INELIG_STUD_F929D mockup.pdf
#5	Client Correspondence	CF_AP_INELIGIBLE_STUDENT mockup	CF_AP_INELIGIBLE_STUDENT mockup.pdf

4 REQUIREMENTS

REQ #	REQUIREMENT TEXT	HOW REQUIREMENT MET
2.18.2.1 CAR-1223	The LRS shall include standard electronic templates for all notices, NOAs, forms, letters, stuffers, and flyers that can be easily maintained by non-technical COUNTY-specified Users.	Update existing NOAs to remove JOBS references.

Design

CA-284475

AB 1808 – Allow Child Care up to 24 Month
Certification

DOCUMENT APPROVAL HISTORY

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DATE

VERSION

REVISION DESCRIPTION

AUTHOR

12/05/2024

1.0

Initial

Kusnadi.E

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CA-284475 – AB 1808 Allow Child Care up to 24 Month Certification

1 OVERVIEW

Per AB 1808 a family with established initial eligibility or ongoing eligibility shall receive services for not less than 24 months before having their eligibility or need recertified and not be required to report changes to income or other change for at least 24 months. Currently, in CalSAWS a Child Care Certificate can only be created for a 12-month Certificate Period and Child Care Authorization records can be created for 1 year or less at a time. This SCR will update CalSAWS to allow users to create a Child Care Certificate with a 24-month Certificate Period at a time to meet the requirement of AB 1808.

1.1 Current Design

Currently in CalSAWS users can only create a Child Care Certificate with a certificate period of 12-month and Child Care Authorizations for 1 year or less at a time.

1.2 Requests

Update CalSAWS to allow users to create a Child Care Certificate with a certificate period of up to 24-month and Child Care Authorizations for 2 years or less at a time.

1.3 Overview of Recommendations

1. Update the existing validation message on the Child Care Certificate Detail page to allow user to create a Child Care Certificate with a certificate period of up to 24-months.
2. Update the existing validation message on the Select Certificate Period page to allow user to create a Child Care Certificate with a certificate period up to 24-months.
3. Update the existing validation message on the Child Care Authorization Detail page to allow user to create a Child Care Authorization Detail record for 2 years or less.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. Children who are 12 years old when certified will continue to receive aid under the approved Child Care Certificate even after they turn 13 years old. However, a new certificate cannot be created once the child turns 13 years old, except if the child has exceptional needs.

- For children who are 12 years old when certified are only eligible for 12 months, including time after they turn 13 years. User will need to input the certification period of 12 months and not 24 months when creating the Child Care Certified.

2 RECOMMENDATIONS

2.1 Child Care Certificate Detail

2.1.1 Overview

The Child Care Certificate Detail page allows user to create, edit or view a child care certificate for a participant/beneficiary. This SCR will update the page to allow users to create a child care certificate from a 12-month period to a 24-month period at a time to meet the requirement of AB 1808.

2.1.2 Child Care Certificate Detail Mockup

Child Care Certificate Detail

*- Indicates required fields

Cancel

- [Certificate Period \(From\)](#) - Certificate Period must be within a 24 month period.

Primary:

Tuukanen, Armida 25F

Certificate ID:

Certificate Period: *

From: 07/01/2025



To: 07/01/2029



Continue

Schedule *

Regular

	Su	Mo	Tu	We	Th	Fr	Sa	Time In	Time Out
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="v"/> : <input type="text" value="v"/> : <input type="text" value="v"/>	<input type="text" value="v"/> : <input type="text" value="v"/> : <input type="text" value="v"/>

Vacation

	Su	Mo	Tu	We	Th	Fr	Sa	Time In	Time Out
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="v"/> : <input type="text" value="v"/> : <input type="text" value="v"/>	<input type="text" value="v"/> : <input type="text" value="v"/> : <input type="text" value="v"/>

Remove

Add

☐ Variable

Figure 2.1.1a – Child Care Certificate

Child Care Certificate Detail

*- Indicates required fields



Images

Save And Copy

Save

Cancel

- **Certificate Period (From)** - Certificate Period must be within a 24 month period.

Primary: Tuukanen, Armida 25F	Funding Source: Stage 1	Certificate ID: 4018510073
Certificate Period: * From: 07/15/2024 To: 06/30/2028  Clear		
Child's Name: * Tuukanen, Houcine 5F	Status: * Approved 	

Activities			
Type	Status	Begin Date	End Date
<div>Select</div>			

Figure 2.1.1b – Child Care Certificate (Edit mode)

2.1.3 Description of Changes

1. Update the existing validation message "Certificate Period (From) – Certificate Period must be within a 12 month period." to "Certificate Period (From) – Certificate Period must be within a 24-month period."
 - a. Update the existing logic so that the validation message will be trigger when the user clicks on the 'Continue' button, 'Save and Copy' button or the 'Save' button and the date entered on the Certificate Period field (From and To field) is more than a 24-month period.
 - i. The 24-month period will be calculated based on the 24-month from the Date entered on the From field.
 1. Example 1: Validation will not trigger when the date entered on the From field is 01/30/2024 and date entered on the To field is 12/25/2025.
 2. Example 2: Validation will trigger when the date entered on the From field is 07/01/2025 and date entered on the To field is 07/01/2029.

2.1.4 Page Location

- **Global: Child Care**
- **Local: Case Summary**
- **Task: Child Care Certificates**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

The following Accessibility enhancements have been identified:

- Table header text should not be empty.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Select Certificate Period

2.2.1 Overview

The Select Certificate Period page allows user to re-create a Child Care Certificate. This SCR will update the page to allow users to re-create a child certificate from a 12-month period to 24-month period at a time.

2.2.2 Select Certificate Period Mockup

The mockup shows a form titled "Select Certificate Period". At the top right are "Continue" and "Cancel" buttons. Below the title is a red asterisk icon followed by the text "Indicates required fields". A red bullet point message states: "• **New Certificate Period (From)** - Certificate Period must be within a 24 month period." The main form area has a header "New Certificate Period: *". It contains two date fields: "From:" with the value "07/01/2025" and "To:" with the value "07/01/2028". Both fields have a calendar icon to their right. At the bottom right of the form are "Continue" and "Cancel" buttons. A dark blue footer bar at the bottom of the mockup contains the text: "This Type 1 page took 0.47 seconds to load."

Figure 2.2.1 – Select Certificate Period

2.2.3 Description of Changes

1. Update the existing validation message "Certificate Period (From) – Certificate Period must be within a 12 month period." to "Certificate Period (From) – Certificate Period must be within a 24-month period."
 - a. Update the existing logic so that the validation message will be trigger when the user clicks on the 'Continue' button and the date entered on the Certificate Period field (From and To field) is more than a 24-month period.
 - i. The 24-month period will be calculated based on the 24-month from the Date entered on the From field.

1. Example 1: Validation will not trigger when the date entered on the From field is 01/30/2024 and date entered on the To field is 12/25/2025.
2. Example 2: Validation will trigger when the date entered on the From field is 07/01/2025 and date entered on the To field is 07/01/2028.

2.2.4 Page Location

- **Global: Child Care**
- **Local: Case Summary**
- **Task: Child Care Certificates**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

Accessibility was assessed and no changes are needed for this page as part of this SCR.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Child Care Authorization Detail

2.3.1 Overview

The Child Care Authorization Detail page allows user to create, edit or view the details of a Child Care Authorization record associated to the participant's beneficiary. This SCR will update the page to allow users to create a Child Care Authorization record from 1 year to 2 years or less.

2.3.2 Child Care Authorization Detail Mockup

Child Care Authorizations Detail

*- Indicates required fields

Save And Return

Cancel

- **End Date** - Date range should be 2 years or less.

Name: *

Barners, Gunilla 2F

APP Agency:

MAOF CHILD CARE

Begin Date: *

12/10/2024

End Date: *

12/10/2028

Authorization Detail:

Stage:

Stage 1

Cal-Learn:

No

Rate Type: *

Monthly

Special Need: *

No Special Need

Weekly Hours: *

40.00

Provider: *

ANKIT C. Select

Provider Type: *

Licensed

Care Type: *

Licensed provider - family day care

Figure 2.3.1 – Child Care Authorization Detail

2.3.3 Description of Changes

1. Update the existing validation message "End Date – Date range should be 1 year or less." to "End Date – Date range should be 2 years or less."
 - a. Update the existing logic so that the validation message will be trigger when the user clicks on the 'Save And Return' button and the date entered on the End Date field is more than 2 years from the Begin Date.
 - i. The 2 year or less period will be calculated based on 2 years from the Date entered on the Begin Date field .
 1. Example 1: Validation will not trigger when the date entered on the Begin Date field is 12/10/2024 and date entered on the End Date field is 12/10/2026
 2. Example 2: Validation will trigger when the date entered on the Begin Date field is 12/10/2024 and date entered on the End Date field is 12/10/2028

Note: The Child Care Authorization Detail page is only used by Los Angeles County. System will also continue to create all subsequent Child Care

Authorization record (one for each month) when the initial Child Care Authorization Record is initially created.

2.3.4 Page Location

- **Global: Child Care**
- **Local: APP**
- **Task: Child Care Authorizations**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

The following Accessibility enhancements have been identified:

- Table header text should not be empty.

2.3.8 Page Usage/Data Volume Impacts

N/A

2.4 Automated Regression Test

2.4.1 Overview

Expand the existing Child Care Certificate Period script to also verify the 24-month period validation on the Child Care Certificate Detail page.

2.4.2 Description of Changes

1. Update the existing "CC - Certificate Period" script to also verify that the updated validation message captured in section 2.1 displays on the Child Care Certificate Detail page when a user clicks on the 'Continue' button, 'Save and Copy' button or the 'Save' button and the date range of the Certificate Period is more than a 24-month period.

CalSAWS

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CA-285584

SB 311 Phase 2 - SSP only MSP Discontinuances

DOCUMENT APPROVAL HISTORY

Prepared By	Tisha Mutreja
Reviewed By	Chad Quan, Geetha Ramalingam, Lena Lam, Raj Devidi, Sireesha Kommajosyula, Naresh Barsagade, Suneetha Minnekanti, Narendar Sabbani

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
12/06/2024	0.1	Initial Draft	Tisha Mutreja
03/28/2025	0.2	Updated effective date throughout the design since the implementation date was pushed out	Tisha Mutreja

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CA-285584 – SB 311 Phase 2 - SSP only MSP Discontinuances

1 OVERVIEW

The purpose of this SCR is to prevent granting QMB (Qualified Medicare Beneficiary)/SLMB (Specified Low-Income Medicare Beneficiary)/QI-1 (Qualifying Individual) eligibility to individuals receiving SSP (State Supplementary Payment) only.

1.1 Current Design

With CA-259984 implemented on 12.05.2024, effective January 01, 2025, Medi-Cal EDBC rules were updated to no longer grant MSP eligibility to a qualified QMB/SLMB individual that has a high-dated OPA (Other Program Assistance) record with the "Type of Assistance" as 'SSI Only' or 'SSI/SSP' as of January 01, 2025, or later.

The "Type of Assistance" as 'SSP Only' was not included in the criteria to identify impacted population.

CalSAWS Batch EDBC functionality allows Batch EDBC to automatically add a standard Journal entry to cases processed by Batch EDBC with:

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for [MONTH YEAR].

Long Description: Batch EDBC ran for [MONTH YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: <Batch EDBC Sweep Code Short Description>

1.2 Requests

1. Prevent granting MSP Eligibility to qualified MSP individuals with SSP only effective September 01, 2025.
2. Initiate a one-time process to run Batch EDBC for identified individuals with SSP only OPA record to discontinue MSP Individuals effective September 01, 2025.
3. Create a Journal for identified population from the one-time batch.
4. Provide a one-time county list for County Eligibility Workers to follow-up on any MSP individuals who may remain active after the one-time transition batch processing is complete.
5. Suppress any NOAs generated from the one-time batch.

1.3 Overview of Recommendations

1. Update Medi-Cal EDBC rules to deny MSP eligibility to identified QMB/SLMB/QI individuals with SSP only effective September 01, 2025.
2. Create a one-time process to run Batch EDBC for identified MSP individuals with SSP only record to discontinue effective September 01, 2025.

3. Add a Batch EDBC Sweep Code to display the Journal Description reason: "Discontinued SSP only MSP individual".
4. Generate a one-time county list to aid the counties to discontinue any Active MSP individuals with SSP only after Batch EDBC completes.
5. Create a Database Change Request (DCR) to reject all MC NOAs that generated from the one-time batch.

1.4 Assumptions

1. Per DHCS confirmation, currently, in policy, there is no Notice of Action (NOA) stating that an individual is being discontinued from MSP due to receipt of SSI/SSP.
2. DHCS will be handling the issuance of Approval NOAs for SSI/SSP members enrolled into the QMB program by the state as part of Phase I, starting October 01, 2024, as outlined in MEDIL [24-17](#). This notice will be sent to all individuals upon their SSI QMB approval.
3. No MEDS changes will be required.
4. CA-209344: Apply SSP Only OPA for Specific Programs, will be implemented in future release.

2 RECOMMENDATIONS

2.1 Medi-Cal Eligibility Rules Updates

2.1.1 Overview

Effective September 01, 2025, CalSAWS should deny eligibility to an SSP only individual that applies for QMB/SLMB/QI-1.

2.1.2 Description of Changes

1. Effective September 01, 2025, update the Medi-Cal EDBC rules to no longer grant MSP eligibility to a qualified QMB/SLMB/QI-1 (80/8C/8D) individual that has an OPA record with "Type of Assistance" as 'SSP Only' effective for at least a day in a benefit month as of September 01, 2025, or later.
 - a. Save the SSP only individual on the MSP Budget(s) as below:
 - i. **Role:** FRI
 - ii. **Role Reason:** On Aid Another Case

The screenshot shows the 'Medi-Cal Summary' page. At the top, a note states: 'Note: Overridden rows are in bold.' Below this, there are two main sections: 'Eligible Budgets for MEDS' and 'Failed and Overridden Budgets'. The 'Eligible Budgets for MEDS' section has a table with columns: Test, Result, SOC, % Oblig, FBU, Aid Code, Members Tested, Role, and Role Reason. It currently shows 'No Data Found'. The 'Failed and Overridden Budgets' section has a similar table. One row is visible: 'MSP - MC' (Test), 'Fail' (Result), '\$0' (SOC), '0.00' (% Oblig), 'Kiki, Miu 28F' (Members Tested), 'FRI' (Role), and 'On Aid Another Case' (Role Reason). The 'Role' and 'Role Reason' columns for this row are highlighted with a red box. Below the table, there is a button labeled 'Override Medi-Cal Summary'. At the bottom right, there are two buttons: 'Accept' and 'Cancel'.

Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
No Data Found								
Failed and Overridden Budgets								
Test	Result	SOC	% Oblig	FBU	Aid Code	Members Tested	Role	Role Reason
MSP - MC	Fail	\$0	0.00			Kiki, Miu 28F	FRI	On Aid Another Case

[Override Medi-Cal Summary](#)

[Accept](#) [Cancel](#)

Figure 2.1.2 Medi-Cal EDBC Summary Page

2.1.3 Programs Impacted

Medi-Cal

2.1.4 Performance Impacts

N/A

2.2 One-Time Batch

2.2.1 Overview

Initiate a one-time process to run Batch EDBC for identified MSP individuals who are receiving SSP only in Medi-Cal programs including those with the Yellow Banner, to discontinue MSP eligibility effective September 01, 2025. Create a Journal entry for the identified population processed successfully in the one-time process.

2.2.2 Description of Change

1. Batch EDBC

Initiate a one-time process to discontinue identified MSP individuals effective September 01, 2025

- a. Identify individuals that meet all the following conditions for one-time Batch EDBC processing:
 - i. The individual is on aid code 80/8C/8D
 - ii. Has an effective OPA record with "Type of Assistance" as 'SSP Only' as of September 01, 2025, or later
- b. Run Batch EDBC for the September '2025 benefit month for the Medi-Cal program in Targeted Program mode with Type Code "Batch Eligibility" (BE). Include the new Batch EDBC Sweep Code added in Recommendation 2.2.2.2.

2. Journal Entry

Add a new Batch EDBC Sweep Code (CT_942) for the identified population in recommendation 2.2.2.1.

Code Table	Description
Short Description	Discontinued SSP only MSP Individual
Long Description	Discontinued SSP only MSP Individual

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.2.2.1.

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for September 2025.

Long Description: Batch EDBC ran for September 2025.
Batch EDBC processed for the Medi-Cal program for the following reason: Discontinued SSP only MSP Individual

3. Batch Exception for Medi-Cal programs with Yellow Banner

Update the following EDBC Skip Reason 'EDBC has not been run since Conversion' (CT707_CN) to not skip the Medi-Cal program if one of the following Batch Eligibility Sweep Codes is applied in addition to the existing criteria in 2.2.2.1:

- a. 'Individual Discontinuance and RE Advanced' (CT_942_ID)
- b. 'Discontinue Medi-Cal Program for Non-Receipt or Income RD' (CT_942_MR)

2.2.3 Execution Frequency

One-Time

2.2.4 Key Scheduling Dependencies

One-time process will run on July 21, 2025, to insert records to be processed by the regularly scheduled Batch EDBC.

2.2.5 Counties Impacted

All Counties

2.2.6 Data Volume/Performance

Approximately 4000 individuals will be processed with this change.
No NOAs will be sent to Central Print because they will be Rejected with Recommendation 2.3.

2.3 Correspondence – DCR to Reject Batch Generated NOAs

2.3.1 Overview

Create a DCR to set the NOAs generated from this one-time batch with a NOA status of 'Rejected' to prevent any NOAs from being sent out via central-print jobs.

2.3.2 Description of Change

1. Create a DCR query to set all NOAs generated from the one-time batch with a NOA status of 'Rejected' (CT220_RJ).

CC Technical Note: A case that has undergone the one-time batch can be identified in the BATCH_ELIG_LOG.SYS_TRANSACT_CREATED_BY column with value '285584'.

2.4 Automated Regression Test

2.4.1 Overview

Create automated regression test scripts to verify that when Medi-Cal EDBC is run for a QMB (aid code 80) case in benefit month 09/2025 or later:

1. On a case with OPA "Type of Assistance" 'SSP Only', the MSP - MC test fails due to 'On Aid Another case'.
2. On a case with no OPA records, the MSP - MC test passes, and aid continues under aid code 80.

2.4.2 Description of Change

1. Create regression scripts to verify that MSP eligibility is granted under aid code 80 for MSP applicants who are QMB eligible with no OPA records.
 - a. Create regression scripts to verify that MSP eligibility is not granted for MSP applicants who are otherwise QMB eligible but have an OPA record with "Type of Assistance" as 'SSP Only'.

Developer Note: See deprecated 'MC - MSP Property Limit - Single' script for case construct details.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Policy	ACWDL 24-01	 ACWDL Medicare Part A Buy-in.pdf
2	Policy	MEDIL I 24-17	 MEDIL 24-17.pdf

4 OUTREACH

4.1 Lists

1. Generate a one-time County list for the County Eligibility Workers after Batch EDBC completes.

List Name: SSP Only MSP Individuals not processed

List Criteria: Generate a list of cases where the MSP individual with SSP only OPA record remains Active on aid code 80/8C/8D after the one-time Batch EDBC is processed (recommendation 2.2.2.1.a)

Standard Columns:

- Case Name
- Case Number

- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):

- Person Name <First Name, Last Name>
- CIN
- Aid Code
<Column will have aid codes 80, 8C or 8D>
- DOB

Frequency: One-time

County Action: Workers should run an online Eligibility Determination and Benefit Calculation (EDBC) to ensure the SSP QMB/SLMB/QI-1 individual is correctly discontinued. Once the worker has confirmed the EDBC results to be correct, authorize the EDBC. If the online EDBC does not discontinue the SSP QMB/SLMB/QI-1 individual, workers should evaluate what action(s) are required, i.e. lift soft pause, request a negative action via a MAGI request. Also, if a notice is generated, the worker will need to reject that notice manually. Individuals on the posted list should be discontinued effective 09/01/2025.

2. Generate one-time report to provide statistics by county.

List Name: SSP only MSP Discontinuance Statistics

The list will display the below columns:

- County
- Total Targeted Population
- Individuals Discontinued
- Cases Discontinued

List Criteria:

- **Total Targeted Population:** includes all individuals that meet below criteria –
 - The individual is on aid code 80/8C/8D
 - Has an effective OPA record with "Type of Assistance" as 'SSP Only' as of September 01, 2025, or later.
- **Individuals Discontinued:** Individuals discontinued from MSP (on aid code 80/8C/8D) because of one-time process (2.2.2.1)
- **Cases Discontinued:** Case discontinued has all individuals discontinued from MSP because of one-time process

Frequency: One-time

County Action: N/A

The lists will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-285584

Design

**CA-285887 RPA Bots for BenefitsCal EBT and BIC
Card Requests**

DOCUMENT APPROVAL HISTORY

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DATE

VERSION

REVISION DESCRIPTION

AUTHOR

1/11/2025

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Cosmetic changes

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CA-285887 - RPA Bots for BenefitsCal EBT and BIC Card Requests

1 OVERVIEW

The design outlines modifications to automate Electronic Benefits Transfer (EBT) and Benefits Identification Card (BIC) card requests received from BenefitsCal for county participants.

1.1 Current Design

Currently, customers can request a replacement EBT or BIC card from BenefitsCal. A unique task is created in CalSAWS after a customer request a replacement EBT or BIC card. These requests are managed and processed manually by the County staff.

1.2 Requests

Automate all EBT and BIC card replacement requests that are received from BenefitsCal.

1.3 Overview of Recommendations

1. Use robotic process automation (RPA) technology to automate completion of all tasks stemming from BenefitsCal for EBT and BIC card requests for the county.

1.4 Assumptions

1. No core CalSAWS application changes are required.
2. No change to BenefitsCal's and BenefitsCal card request process.
3. This System Change Request (SCR) accounts for design, configuration, and testing, and post implementation support of the RPA technology only.
4. No change to EBT exception established by SCR CA-254796 listed in Figure 2.1.2.3 1: EBT and BIC Exceptions Reference Information.

2 RECOMMENDATIONS

This section outlines the RPA bot BenefitsCal EBT/BIC card replacement process flow.

2.1 BenefitsCal EBT and BIC Card Replacement request using RPA

2.1.1 Overview

This section describes the new BenefitsCal EBT/BIC card replacement business process using RPA.

2.1.2 Description of Change

Update the RPA bot BenefitsCal EBT/BIC card replacement workflow. The new process includes identification of BenefitsCal EBT and BenefitsCal BIC replacement card tasks, execution of EBT and BIC card replacement requests, completion of the Journal Entry, and completion of the tasks.

2.1.2.1 BenefitsCal EBT Card Request

The RPA will take the following steps to retrieve BenefitsCal EBT card request tasks.

1. Access CalSAWS - <https://web.calsaws.net>



Figure 2.1.2.1 1: Login Screen

2. Enter the RPA account username.



Figure 2.1.2.1 2: CalSAWS Password Screen

3. Click the "Log In" button.
 - a. See Figure 2.1.2.1.2 above
4. Enter the RPA account password.
5. Click the "Log In" button.
 - b. See Figure 2.1.2.1.2 above
6. Click on the Accept button on the CalSAWS Security Screen.

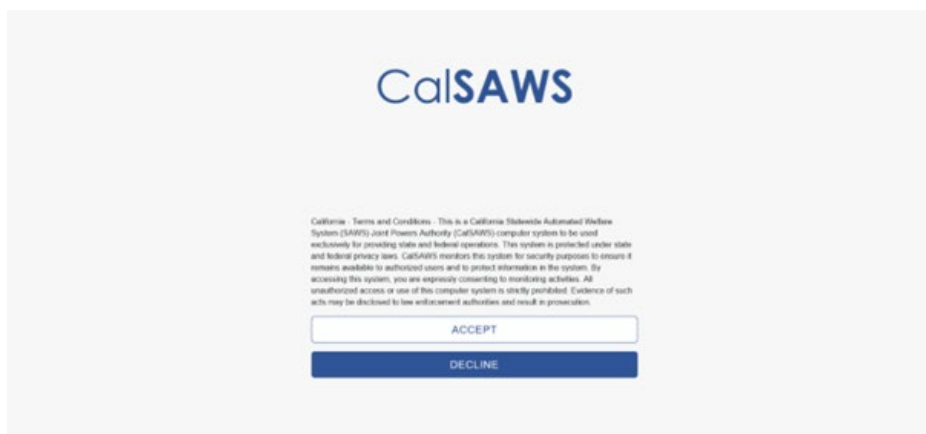


Figure 2.1.2.1 3: CalSAWS Security Screen

7. Click on "Tasks" then "Task Search"
 - a. See Figure 2.1.2.1.4 below

Task Search

* Indicates required fields

▼ Refine Your Search

Display Mode: Standard

Case Number: [] Select

Worker ID: [924-500-4800] Select

Status: Assigned In Progress

Priority: []

Due Date From: [] To: []

Program: []

Bank ID: [] Select

Category: []

Newly Assigned: []

To: []

Office Name: [] Select

Type: []

Expedited: []

Unit ID: [] 00

Sub-Type: []

Results per Page: 100 Search

Due Date	Case	Case Name	Program(s)	Category	Type/Sub-Type	Status	Worker ID	Bank ID	Date Appended
No Data Found									

100% 1 page took 0.30 seconds to load.

Figure 2.1.2.1 4: CalSAWS Task Search Page

8. Populate search with required details for county:
 - a. See figure 2.1.2.1.5 below
 - b. Worker Id: <Blank>
 - c. Status: "Assigned"
 - d. Category: "Self Service Portal Communications"
 - e. Type: "Customer request EBT card replacement"
 - f. Office Name: <County Specific>
9. Retrieve EBT Request Task details and mark task as "Complete"
 - a. Case Number

Task Search

* Indicates required fields

▼ Refine Your Search

Display Mode: Standard

Case Number: [] Select

Worker ID: [] Select

Status: Assigned

Priority: []

Due Date From: [] To: []

Program: []

Bank ID: [] Select

Category: Self Service Portal Communications

Newly Assigned: []

To: []

Office Name: CalSAWS Project Office Select

Type: Customer request EBT card replacement

Expedited: []

Unit ID: [] 00

Sub-Type: []

Search

Advanced Search

Figure 2.1.2.1 4: CalSAWS Task Search Results Page

10. Navigate back to "Home" and click on Case Number field on the CalSAWS Home Page.

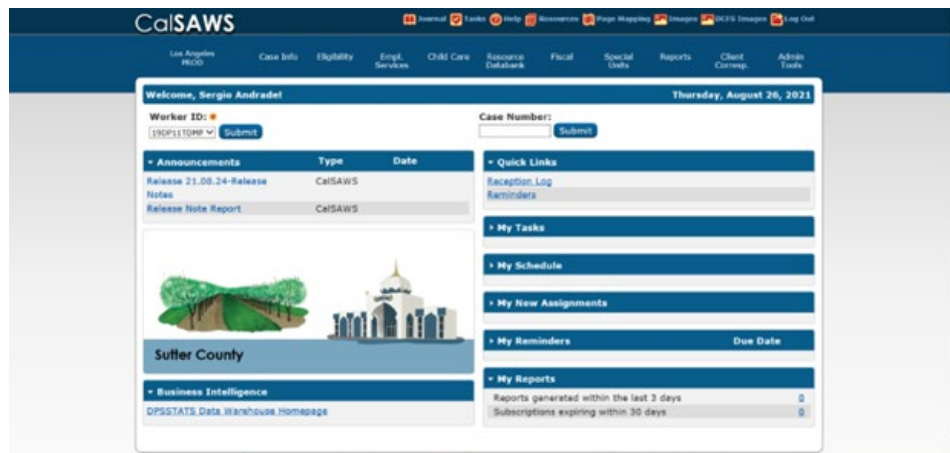


Figure 2.1.2.1 5: CalSAWS Home Page

11. Enter Case Number.
 - b. See Figure 2.1.2.1.6 above
12. Click "Submit" button.
 - c. See Figure 2.1.2.1.6 above
13. Click on "EBT Account List" on the CalSAWS Case Summary Page.

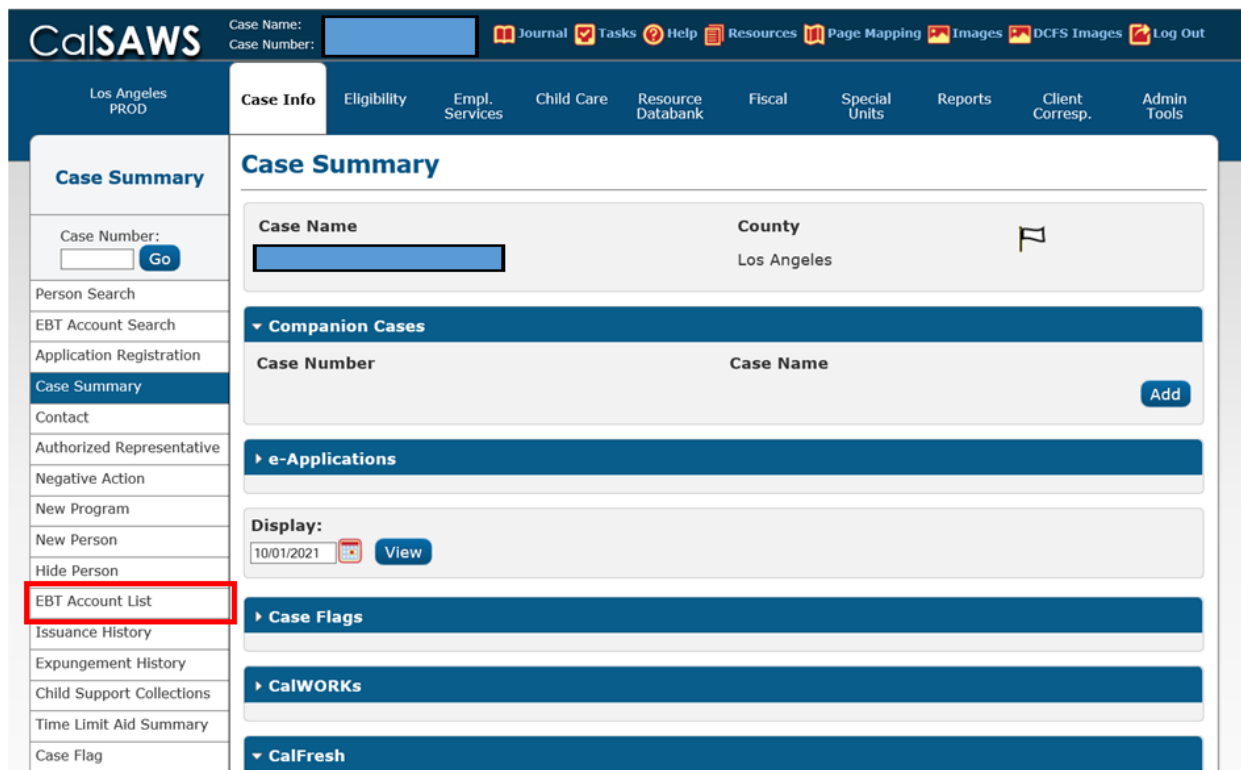


Figure 2.1.2.1 6: CalSAWS Case Summary Page

14. Click on Account Number hyperlink on the EBT Account List Page.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary

Case Number: Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

EBT Account List

Add

Account Number	Primary Cardholder	Cash Status	CalFresh Status	Begin Date	End Date
XXXXXXXXXX		Active	Active	11/20/2015	

Add

This Type_1 page took 0.89 seconds to load.

Figure 2.1.2.1 7: CalSAWS EBT Account List Page

15. Click on Card Number hyperlink on the EBT Account Details Page.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary

Case Number: Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Negative Action

New Program

New Person

Hide Person

EBT Account List

EBT Repayment List

EBT Card Transaction Search

Issuance History

Expungement History

Child Support Collections

Time Limit Aid Summary

EBT Account Detail

Add Card Close

Account Number: Begin Date: End Date:

Card Holder: * Card Access Type: * Card Status:

Cash

Status: Balance:

Active \$30.01

CalFresh

Status: Balance:

Active \$12.57

EBT Account History

Current Cards

Name	Recipient Type	Card Number	Access Type	Status
	Primary	XXXXXXXXXX	Cash & CalFresh	Issued

Figure 2.1.2.1 8: CalSAWS EBT Account Detail Page

16. Click the Reissue Button on the EBT Card Detail Page. At this point, the EBT card will be queued in a batch for mailing to the customer's address on file.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary EBT Card Detail

*- Indicates required fields

Reissue Edit Close

Case Number: Go

Person Search

EBT Account Search

Card Number: Account Number:

Card Information

Figure 2.1.2.1 9: CalSAWS EBT Card Detail Page

17. Next the RPA will create a journal entry. Click the Journal tab in CalSAWS.

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Journal Search Journal Detail

*- Indicates required fields

Case Number: Case Name: Case Name

Entry Information

Journal Category: * Journal Type: * All Interfaces

Initiated By: User Method of Contact:

Short Description: * Long Description:

Append: Append

(03/16/2021 12:51 PM, 19DP15U10R, Eligibility Worker III)

Search Results Summary Results 1 - 2 of 2

Case - Case Name

Template: * Classic Add Entry

Date Type Description

03/16/2021 Interfaces Append

03/11/2021 Interfaces Append

Print With Details Without Details

Template: * Classic Add Entry

Figure 2.1.2.1 10: CalSAWS Journal Detail Page

18. Click Add Entry on the Journal Detail Page.
d. See Figure 2.1.2.1.11 above
19. Populate Journal Entry details.

Journal Search

Case Number: [] Resource ID: []

Category: [All] Type: [All]

Initiated By: [All] Keyword: []

Date From: [03/01/2021] To: [09/01/2021]

Results per Page: [25] Search

Search Results Summary Results 1 - 2 of 2

Date	Type	Description
<input type="checkbox"/> 03/16/2021	Interfaces	[] Append
<input type="checkbox"/> 03/11/2021	Interfaces	[] Append

Print: ☒ With Details ☐ Without Details

Template: [Classic] Add Entry

This Type_1 page took 0.43 seconds to load.

Journal Detail

*- Indicates required fields

Case Number: [] Case Name: [Case Name]

Entry Information

Journal Category: * [Select -] Journal Type: * [Select -]

Initiated By: [User] Method of Contact: []

Short Description: * []

Long Description: * []

Classic

[]

<< Preview Save Cancel

[] 19DP11TDMP, Principal Information Systems Analyst)

This Type_1 page took 0.26 seconds to load.

Figure 2.1.2.1 11: CalSAWS Journal Entry Information Page

20. Click Save on Journal Entry. A journal entry will be created.

Entry Information

Journal Category: *
Interfaces

Journal Type: *
Self Service

Initiated By:
User

Method of Contact:

Short Description: *
EBT Replacement

Long Description:

Classic

Customer has requested a card Replacement with the following information Request to replace EBT Card for Person Name: first last Age xx Transaction completed by the BOT. Task ID: 12345678

Expand Preview **Save** Cancel

Figure 2.1.2.1 12: CalSAWS Journal Detail Page

Journal Search

Help Search

☒ Case Number:
☐ Resource ID:

Category: All Type: All

Initiated By: All Keyword:

10/01/2024 04/21/2025

Results per Page: 25 Search

Case -----

Template: * Classic Add Entry

Date	Type	Description
No Data Found		

Entry Information

Journal Category: *
Interfaces

Journal Type: *
Self Service

Initiated By:
User

Method of Contact:

Short Description: *
EBT Replacement

Long Description:

Classic

Customer has requested a card Replacement with the following information Request to replace EBT Card for Person Name: first last Age xx Transaction completed by the BOT. Task ID: 12345678

Expand Preview **Save** Cancel

Figure 2.1.2.1 13: CalSAWS Journal Detail in Journal Search

2.1.2.2 BenefitsCal BIC Card Replacement Request

The RPA will take the following steps to retrieve BenefitsCal BIC Card Request Tasks.

1. Access CalSAWS - <https://web.calsaws.net/civ/utilities/Homepage/view>.

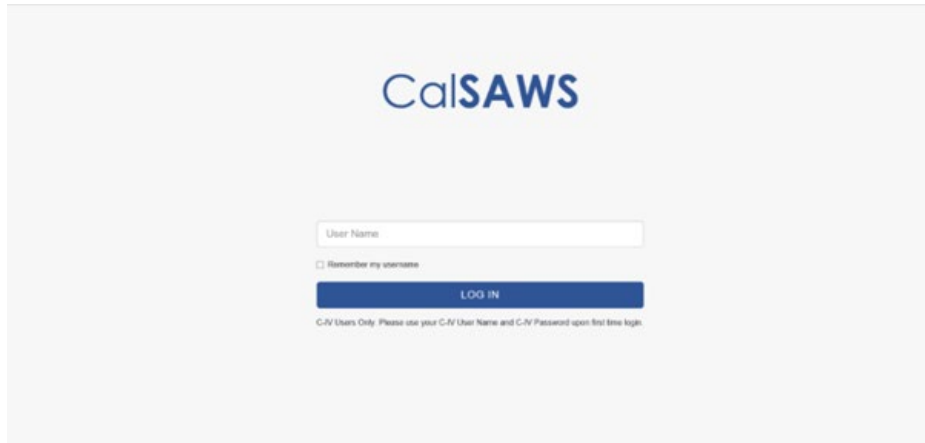
The image shows the CalSAWS login screen. At the top center is the CalSAWS logo. Below it is a text input field labeled "User Name". Underneath the field is a checkbox labeled "Remember my username". Below the checkbox is a blue button with the text "LOG IN". At the bottom of the screen, there is a small line of text that reads "CIV Users Only Please use your CIV User Name and CIV Password upon first time login."

Figure 2.1.2.2 1: CalSAWS Login Screen

2. Enter the RPA Account username.

The image shows the CalSAWS password screen. At the top center is the CalSAWS logo. Below it is a text input field labeled "Enter password". The field contains a series of asterisks to mask the password. Below the field is a blue button with the text "LOG IN".

Figure 2.1.2.2 2: CalSAWS Password Screen

3. Click the "Log In" button.
 - e. See Figure 2.1.2.2.1 above
4. Enter the RPA Account Password.
5. Click the "Log In" button.
 - f. See Figure 2.1.2.2.2 above
6. Click on the Accept button on the CalSAWS Security Screen.

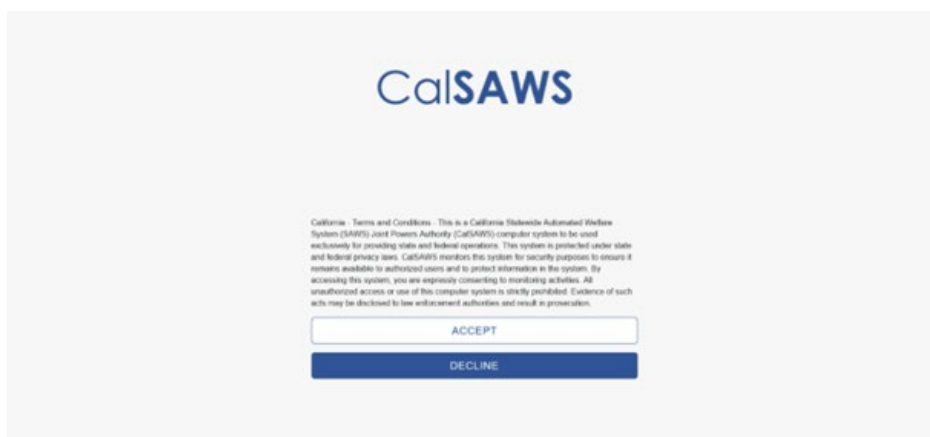


Figure 2.1.2.2 3: CalSAWS Security Screen

7. Click on "Tasks" then "Task Search"
8. Populate search with required details for County:
 - a. Worker Id: <Blank>
 - b. Status: "Assigned"
 - c. Category: "Self Service Portal Communications"
 - d. Type: "Customer request BIC card replacement"
 - e. Office Name: <County Specific>

 The image shows the CalSAWS Task Search Results page. The top navigation bar has tabs for "My Tasks", "My Watchlist", "Task Search" (which is active), and "My Banks". Below the navigation bar, the page title is "Task Search" with a "Help" icon. A red asterisk icon indicates required fields. There is a "Refine Your Search" link and a "Search" button. The search criteria are organized into several sections:

- Display Mode:** A dropdown menu set to "Standard".
- Case Number:** A text input field with a "Select" button.
- Worker ID:** A text input field with a "Select" button.
- Status:** A dropdown menu set to "Assigned".
- Priority:** A dropdown menu.
- Due Date:** A date range selector with "From:" and "To:" fields.
- Program:** A dropdown menu.
- Bank ID:** A text input field with a "Select" button.
- Category:** A dropdown menu set to "Self Service Portal Communications".
- Newly Assigned:** A dropdown menu.
- Office Name:** A text input field with a "Select" button.
- Type:** A dropdown menu set to "Customer request BIC card replacement".
- Expedited:** A dropdown menu.
- Unit ID:** A text input field.
- Sub-Type:** A dropdown menu.

 At the bottom right, there is a "Results per Page: 100" dropdown and a "Search" button.

Figure 2.1.2.2 4: CalSAWS Task Search Results

9. Retrieve BIC Request Task details and mark task as "Complete"
 - a. Case number
 - b. Household member name(s) and age(s)
 1. Expected Format: Customer has requested a card replacement with the following information Request to

Replace BIC Card for Person Name :FName LName
(##),FName LName (##)

10. Navigate back to "Home" and click on Case Number Field on the CalSAWS Home Page.

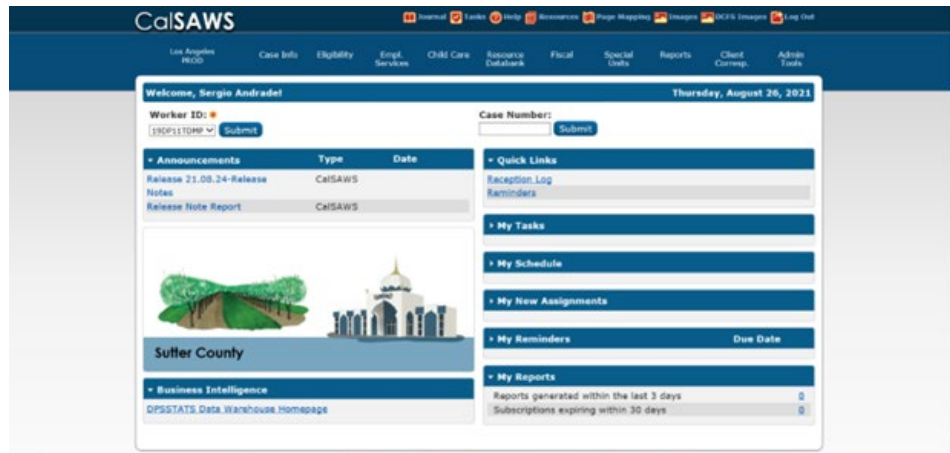


Figure 2.1.2.2 5: CalSAWS Home Page

11. Enter the Case Number
12. Click "Eligibility" then "Case Summary"

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

EBT Account Search
Case Summary
 Contact
 Authorized Representative
 Negative Action
 New Program
 New Person
 Hide Person
 EBT Account List
 Issuance History
 Expungement History
 Child Support Collections
 Time Limit Aid Summary
 Home Visiting
 Legacy Case
 Confidentiality
 ICT Summary
 IAT Summary
 MAGI Case Search
 Customer Contact History
 Invoice History
 Linkages
 General Ledger
 Point Of Service
 Case Copy List

Companion Cases

Self-Service Portal

Display: 04/01/2022 View

Case Flags

CalWORKs

Worker: Customer Service
 Worker ID: [19DP021S03](#)
 Program Status: Active
 RE Due Month: 01/2023 Re-Evaluate
 Reporting Type: Annual Reporting
 Reporting Type Reason: Child Only
 Aid Code: 33 - CW-Zero Parent (Fed)
 Public Assistance Indicator:
 FBU: 1

Primary Applicant/Recipient: 48F
 Language: Spanish
 Phone Number:
 Email:
 Payee: 48F
 Application Date: 02/01/2022

Name	Deprivation	Role	Role Reason	Status	Status Reason
	Absence	MEM		Active	
	Absence	MEM		Active	
	Absence	MEM		Active	
	Absence	MEM		Active	
		FRI	Ineligible Non Citizen	Active	

Figure 2.1.2.2 6: CalSAWS Case Summary -CalWORKs

13. Click "View Details"

CalWORKs

Worker: Customer Service
Worker ID: 19DP021S93
Program Status: Active
RE Due Month: 01/2023 [Re-Evaluate](#)
Reporting Type: Annual Reporting
Reporting Type Reason: Child Only
Aid Code: 33 - CW-Zero Parent (Fed)
Public Assistance Indicator:
FBU: 1

Primary Applicant/Recipient: 48F
Language: Spanish
Phone Number:
Email:
Payee: 48F
Application Date: 02/01/2022

Name	Deprivation	Role	Role Reason	Status	Status Reason
	Absence	MEM		Active	
	Absence	MEM		Active	
	Absence	MEM		Active	
	Absence	MEM		Active	
		FRI	Ineligible Non Citizen	Active	
		MEM		Denied	
		MEM		Discontinued	Age 18 Requirements
		MEM		Discontinued	Age 18 Requirements

[View WPR](#)
[View Details](#)

Figure 2.1.2.2 7: CalSAWS Case Summary – CalWORKs Program

14. Click hyperlink for matching household member name and age.

CalWORKs Detail

* - Indicates required fields

[View History](#)
[Issuance Method](#)
[Edit](#)
[Close](#)

Date: *
04/01/2022

Program Information

Status: *
Active
Application Date: *
02/01/2022
Reporting Type:
Annual Reporting
Automatically Reassign When Activated:
No

Status Reason:
RE Begin Month:
02/2022
Reporting Type Reason:
Child Only

Source: *
Mail In Application
RE Due Month: *
01/2023

Administrative Roles

Name	Administrative Role	Begin Date	End Date	Use Between Payees
	Primary Applicant/Redpient	03/01/2003		
	Payee	03/01/2003		

Program Persons

Name	Role	Role Reason	Status	Status Reason
	MEM		Active	
	MEM		Active	
	MEM		Active	
	MEM		Active	
	FRI	Ineligible Non Citizen	Active	

Figure 2.1.2.2 8: CalSAWS Detail page

15. Click "Reissue BIC"

CalWORKs Person Detail

* - Indicates required fields

Edit

Reissue BIC

Close

Recipient Information

Name: *

14F

Application Detail

Application Date *

02/01/2022

Beginning Date Of Aid: *

02/01/2022

Cash-based Medi-Cal BDA:

Figure 2.1.2.2 9: CalWORKs Person Detail page

16. Next the RPA will create a journal entry. Click the Journal tab in CalSAWS.

CalSAWS

Case Name:

Case Number:

Journal

Tasks

Help

Resources

Page Mapping

Images

DCFS Images

Log Out

Los Angeles

Case Info

Eligibility

Enroll

Child Care

Resource

Fiscal

Special

Reports

Client

Admin Tools

Journal Search

Case Number:

Resource ID:

Category: All

Type: All

Initiated By: All

Keyword:

Date From: 03/01/2021

To: 09/01/2021

Results per Page: 25 Search

Search Results Summary

Results 1 - 2 of 2

Case - - Case Name

Template: * Classic Add Entry

Date

Type

Description

03/16/2021

Interfaces

Append

03/11/2021

Interfaces

Append

Print

With Details

Without Details

Template: * Classic Add Entry

Journal Detail

Case Number:

Case Name: Case Name

Entry Information

Journal Category: *

All

Journal Type: *

Interfaces

Initiated By:

User

Method of Contact:

Short Description: *

Long Description:

Append:

Append

(03/16/2021 12:51 PM, , 19DP15U10R, Eligibility Worker III)

Figure 2.1.2.2 10: CalSAWS Journal Detail Page

17. Click Add Entry on the Journal Detail Page.

g. See Figure 2.1.2.2.10 above

18. Populate Journal Entry details.

Journal Search - County of Los Angeles - CalSAWS - Work - Microsoft Edge

Journal Search

Case Number: [] Resource ID: []

Category: [All] Type: [All]

Initiated By: [All] Keyword: []

Date From: [03/01/2021] To: [09/01/2021]

Results per Page: [25] Search

Search Results Summary Results 1 - 2 of 2

Date	Type	Description
03/16/2021	Interfaces	[] Append
03/11/2021	Interfaces	[]

Print [] With Details [] Without Details

Template: [Classic] Add Entry

This Type 1 page took 0.43 seconds to load.

Journal Detail

Case Number: [] Case Name: [Case Name]

Journal Category: [Select] Journal Type: [Select]

Initiated By: [User] Method of Contact: []

Short Description: []

Long Description: []

Classic

[]

<< Preview Save Cancel

19DP11TDMP, Principal Information Systems Analyst)

This Type 1 page took 0.26 seconds to load.

Figure 2.1.2.2 11: CalSAWS Journal Entry Information Page

19. Click Save on Journal Entry. A journal entry will be created.

Entry Information

Journal Category: *

Interfaces

Journal Type: *

Self Service

Initiated By:

User

Method of Contact:

Short Description: *

BIC Replacement

Long Description:

Classic

Customer has requested a card Replacement with the following information Request to replace BIC Card for Person Name: first last Age xx Transaction completed by the BOT. Task ID: 12345678

Expand

Preview

Save

Cancel

Figure 2.1.2.2 12: CalSAWS Journal Detail Page

Journal Search

Case Number:

Resource ID:

Category:

Type:

Initiated By:

Keyword:

10/01/2024

04/21/2025

Results per Page: 25

Search

Case -

Template: * Classic

Add Entry

Date

Type

Description

No Data Found

Template: * Classic

Add Entry

Entry Information

Journal Category: *

Interfaces

Journal Type: *

Self Service

Initiated By:

User

Method of Contact:

Short Description: *

BIC Replacement

Long Description:

Classic

Customer has requested a card Replacement with the following information Request to replace BIC Card for Person Name: first last | Age xx Transaction completed by the BOT. Task ID: 12345678

Expand

Preview

Save

Cancel

Figure 2.1.2.2 13: CalSAWS Journal Detail Page

2.1.2.3 Reissuance Exceptions

If there is a failure at any point in the process of re-issuing a card or creating a journal entry, an exception task will be created and assigned to a task bank or County worker specified by the County using following the steps below.

1. Click on the 'Tasks' tab on the CalSAWS home page.

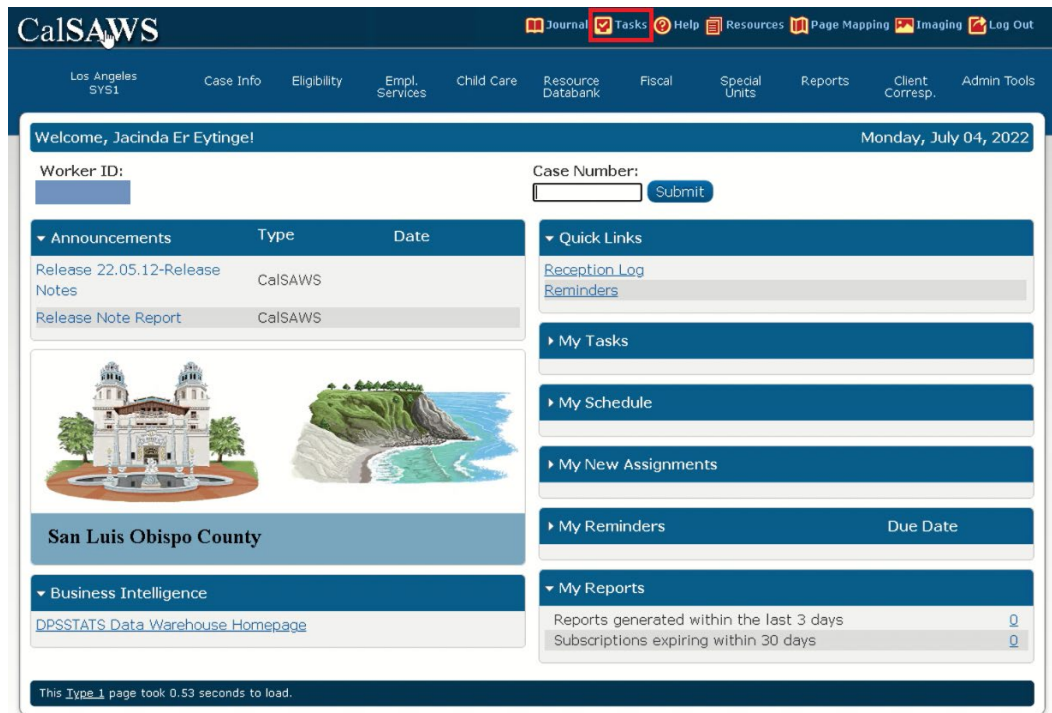


Figure 2.1.2.3 2: CalSAWS Home Page

2. Click on 'Task Search' on the My Tasks page.

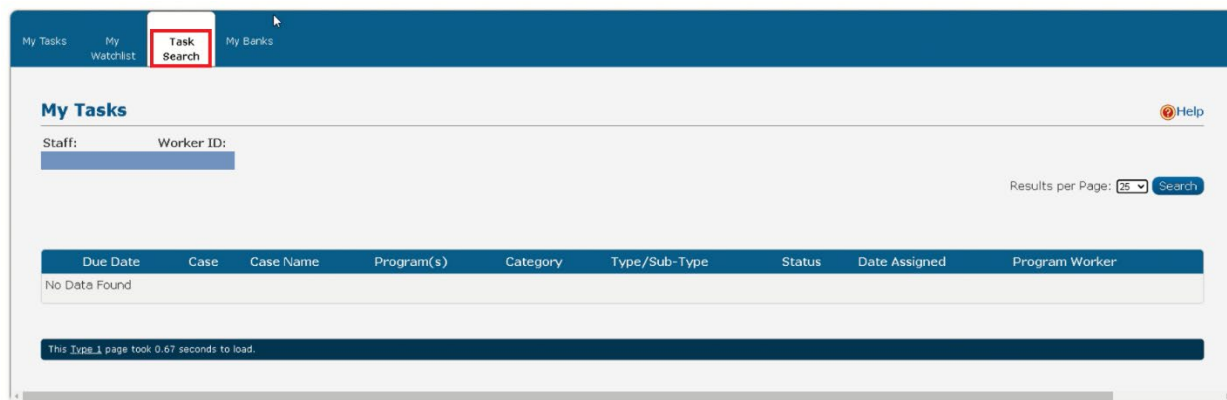


Figure 2.1.2.3 3: CalSAWS My Tasks Page

3. Click on 'Add Task' on the Task Search page.

Figure 2.1.2.3 4: CalSAWS Tasks Search Page

4. Populate case details and exception reason on the Task Details page. Click Save and Return to submit the task.

Figure 2.1.2.3 5: CalSAWS Task Details Page

EBT Exceptions
EBT Card has no hyperlink
Case has no account number
Case has no EBT card number
New Card Number Not Generated
Unable to issue EBT card replacement received due to confidential case.
Address too long
Reissue Button Not Found
Error Encountered
Missing Address
Case Id Not found in CalSAWS
EBT Account has End Date
No primary account
City name too long
Unable to set delivery method

BIC Exceptions
Name Not Found in Program Block
Role/Status Does Not Match
Confidential Case
New Card Number Not Generated
Age Does Not Match
Case not found

Figure 2.1.2.3 6: EBT and BIC Exceptions Reference Information

3 SUPPORTING DOCUMENTS

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

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT

4 OUTREACH

[Include any specific outreach that needs to occur with implementation i.e. a CIT, a special webcast or onsite demonstration, any lists, etc.]

4.1 Lists

[Include a summary of the list(s). If there is more than one list, separate them with a numbered list and include the Location and Standard Columns only once in the overall summary.]

List Name: <List Name>

List Criteria: <Describe criteria for generating list>

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s): <list additional columns, if any>

Frequency: <One-time, monthly, quarterly, etc.>

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CA-XXXXXX

5 APPENDIX

[Include any supplementary items that may not fit in the Description section. Examples could include flow charts, lengthy code tables, etc.]



Design

CA-286679

**San Bernardino Implement GA/GR Automated
Solution Reports Only**

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Esequiel Herrera-Ortiz	
	Reviewed By	Ravneet Bhatia	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/26/2025	1.0	Initial Version	Esequiel Herrera-Ortiz

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CA-286679 – San Bernardino Implement GA/GR Automated Solution Reports Only

1 OVERVIEW

With SCR **CA-284964 Implement GA/GR Automated Solution program for San Bernardino County**, San Bernardino switched from using the General Assistance (Non-Managed) solution to the GA/GR Automated solution. Several reports need to be updated to capture GA/GR Automated Solution information for San Bernardino rather than the old General Assistance (Non-Managed) solution.

1.1 Current Design

Currently the following reports are not set up to generate for the GA/GR Automated Solution for San Bernardino:

1. Integrated Payroll Benefit Issuance Detail Claiming Report
2. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
3. Main Payroll Benefit Issuance Direct Deposit Register
4. Main Payroll Benefit Issuance EBT Register
5. Main Payroll Benefit Issuance Warrant Register
6. CAPI Cases Receiving GR Benefits

1.2 Requests

1. Update the following Fiscal Reports to generate for the GA/GR program for San Bernardino:
 - a. Integrated Payroll Benefit Issuance Detail Claiming Report
 - b. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
 - c. Main Payroll Benefit Issuance Direct Deposit Register
 - d. Main Payroll Benefit Issuance EBT Register
 - e. Main Payroll Benefit Issuance Warrant Register
2. Update the CAPI Cases Receiving GR Benefits to capture GR payments for the GA/GR Automated solution and the General Assistance (Managed Solution).

1.3 Overview of Recommendations

1. Update the following Fiscal Reports to generate for the GA/GR program for San Bernardino:
 - a. Integrated Payroll Benefit Issuance Detail Claiming Report
 - b. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
 - c. Main Payroll Benefit Issuance Direct Deposit Register
 - d. Main Payroll Benefit Issuance EBT Register
 - e. Main Payroll Benefit Issuance Warrant Register
2. Update the CAPI Cases Receiving GR Benefits to capture GR payments for the GA/GR Automated solution and the General Assistance (Managed Solution).

1.4 Assumptions

1. With CA-275855, the Integrated Payroll Summary Report was updated to consolidate all program and aid code combinations into a single report. One version for Foster Care payments and the other version for Non-Foster Care payments. Because of this change, the Integrated Payroll Summary Report should pick up GA/GR Automated Solution payments automatically.
2. The Main Payroll Fiscal reports do not need to be rescheduled because they are already scheduled to run as a dependency to the Non-Foster Care Main Payroll batch job.
3. Aid codes 9A, 9H, 9I and 9J are specific to San Francisco and will not be include in the list of GA/GR aid codes for the Integrated and Main Payroll reports.
4. The dashboards that were requested by San Bernardino to include the GA/GR automated solution will be updated with **CA-284414 Update Dashboard to include the Counties opting into the GA/GR Automated Solution.**
5. The Main Payroll Benefit Warrant Production Reconciliation Report, Main Payroll Benefit EBT Production Reconciliation Report, and Main Payroll Benefit Direct Deposit Production Reconciliation Report will automatically pick up issuances for the GA/GR automated solution.

2 RECOMMENDATIONS

2.1 Fiscal Reports

2.1.1 Overview

The following fiscal reports generate for all available permutation of programs and their related aid codes at the time they were last updated for a given county. These reports need to be updated to generate for the 'GA/GR Automated Solution' for all the available aid codes.

2.1.2 Integrated Payroll Benefit Issuance Detail Claiming Report Screenshot

CalSAWS Integrated Payroll Benefit Issuance Detail Claiming Report						
San Bernardino						
Run Date: MAR-04-25 02:03 AM						
Date: 02/2025						
Aid Code: 90						
Program: General Assistance (Non-Managed)						
Totals by Aid Code and Pay Code						
Summary						
						Details
Totals:		\$0.00	\$0.00	\$0.00	\$0.00	
Totals by Pay code						
Aid Code	Pay Code	Payment Total	Cancellation Total	Adjustment Total	Overall Total	
90	No Pay Code	\$0.00	\$0.00	\$0.00	\$0.00	

Figure 2.2.1 – Integrated Payroll Benefit Issuance Detail Claiming Report

2.1.3 Description of Change

1. Enable the following reports to generate for the GA/GR Automated Solution and for all available aid codes listed below.
 - a. Main Payroll Benefit Issuance Direct Deposit Register
 - b. Main Payroll Benefit Issuance EBT Register
 - c. Main Payroll Benefit Issuance Warrant Register
 - d. Integrated Payroll Benefit Issuance Detail Claiming Report
 - e. Integrated Payroll Benefit Issuance Detail Claiming Report by Case

COUNTY CODE	PROGRAM CODE	AID CODE
36	GR	90
		91
		92
		93
		94
		95
		96
		97
		98
		9B
		9G

2. Disable the following reports for San Bernardino for the following reports that generate for the General Assistance (Non-Managed) program and the 90, 91, 92 aid codes. All historically generated reports will remain accessible.
 - a. Main Payroll Benefit Issuance Direct Deposit Register
 - b. Main Payroll Benefit Issuance EBT Register
 - c. Main Payroll Benefit Issuance Warrant Register
 - d. Integrated Payroll Benefit Issuance Detail Claiming Report
 - e. Integrated Payroll Benefit Issuance Detail Claiming Report by Case

COUNTY CODE	PROGRAM CODE	AID CODE
36	GN	90
		91
		92

2.1.4 Report Location

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

2.1.5 Counties Impacted

The change outline in this section only impacts San Bernardino.

2.1.6 Security Updates

No updates are made to the report's existing security.

2.1.7 Report Usage/Performance

The report's performance will remain the same.

PROGRAM CODE	DESCRIPTION
GM	General Assistance (Managed)
GR	GA/GR Automated Solution

Note: The report will not include the General Assistance (Non-Managed) program because for that program, only Receipted Collection and Recovery Account Refund payments exist in Fiscal History.

Note the report picks up Monthly Benefits and Supplemental Benefits when the effective date is equal to the report month.

2.2.4 Report Location

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

2.2.5 Counties Impacted

The change outline in this section only impacts San Bernardino.

2.2.6 Security Updates

No updates are made to the report's existing security.

2.2.7 Report Usage/Performance

The report's performance will remain the same.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT



California Statewide Automated Welfare System

Design Document

CA-286821

**Upgrade CalSAWS libraries to be SNYK
compliant**

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Erick Guanzon

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/24/2024	1.0	Initial Draft	Erick Guanzon
01/14/2025	1.1	Modified (Snyk open-source vulnerabilities)	Sandeep Shirsat

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1 OVERVIEW

This SCR will upgrade CalSAWS applications and other open-source libraries to adhere SNYK compliance.

1.1 Request

Refer the below table that will upgrade the libraries for the following CalSAWS applications to adhere SNYK compliance. These impacted known libraries will be updated based on the SNYK recommendations.

1.1.1 Spring-Boot Applications

Open Source Libraries	CalSAWS Version	Application Name
org.springframework:spring-jdbc	5.3.19	AMP
org.springframework.plugin:spring-plugin-core	2.0.0.RELEASE	AMP
org.apache.tomcat.embed:tomcat-embed-jasper	9.0.55	AMP
com.fasterxml.jackson.core:jackson-databind	2.9.8/2.12.13	AMP
com.fasterxml.jackson.datatype:jackson-datatype-jsr310	2.12.13	AMP
org.springdoc:springdoc-openapi-starter-webmvc-ui	2.2.0	AMP
org.apache.sling:org.apache.sling.servlets.post	2.3.4	AMP
org.quartz-scheduler:quartz	2.3.0	AMP
org.apache.tomcat.embed:tomcat-embed-core	9.0.55	AMP
mysql:mysql-connector-java	8.0.28	AMP
org.apache.poi:poi-ooxml	3.11	AMP
org.apache.poi:poi-ooxml-schemas	3.11	AMP
org.apache.xmlbeans:xmlbeans	2.6.0	AMP
xerces:xercesImpl	2.8.1	AMP
com.amazonaws:aws-java-sdk-secretsmanager	1.12.16	AMP
org.apache.tomcat:tomcat-jasper	9.0.43	AMP
org.apache.tomcat:tomcat-util-scan	9.0.43	AMP
org.apache.tomcat:tomcat-util	9.0.43	AMP
org.apache.sling:org.apache.sling.jcr.contentloader	2.1.4	AMP
org.apache.sling:org.apache.sling.engine	2.2.0	AMP
commons-io:commons-io	2.5	AMP
com.google.protobuf:protobuf-java	3.11.4	AMP
com.opencsv:opencsv	4.6	AMP
org.apache.sling:org.apache.sling.commons.json	2.0.6	AMP
junit:junit	4.12	AMP
org.apache.sling:org.apache.sling.junit.scriptable	1.0.12	AMP
org.apache.httpcomponents:httpclient	4.5.7	AMP
com.google.code.gson:gson	2.8.6	AMP

org.zeroturnaround:gradle-jrebel-plugin	1.1.8	AMP
mysql:mysql-connector-java	8.0.15	AMP
org.acegisecurity:acegi-security	1.0.7	Activities
org.springdoc:springdoc-openapi-ui	1.7.0	Activities
com.fasterxml.jackson.dataformat:jackson-dataformat-xml	2.9.8	Activities
com.fasterxml.jackson.datatype:jackson-datatype-hibernate5	2.15.0	Activities
org.springframework.boot:spring-boot-starter-cache	3.3.1	Activities
org.acegisecurity:acegi-security	1.0.7	Appointments
org.springdoc:springdoc-openapi-ui	1.7.0	Appointments
org.springframework.boot:spring-boot-starter-web	2.7.14	CHEWS
org.springframework.boot:spring-boot-starter-actuator	2.7.14	CHEWS
org.glassfish:javax.el	3.0.1-b12	CHEWS
org.acegisecurity:acegi-security	1.0.7	Calsaws Service
org.springdoc:springdoc-openapi-ui	1.7.0	Calsaws Service
com.fasterxml.jackson.dataformat:jackson-dataformat-xml	2.9.8	Calsaws Service
com.fasterxml.jackson.datatype:jackson-datatype-hibernate5	2.12.0	Calsaws Service
org.springframework.boot:spring-boot-starter-cache	3.3.1	Calsaws Service
axios	0.21.4	Email
org.springframework.boot:spring-boot-starter-web	3.3.1	Email
org.springdoc:springdoc-openapi-ui	1.7.0	Email
org.acegisecurity:acegi-security	1.0.7	Email
org.springframework:spring-jms	6.1.9	Email
org.springframework:spring-context-support	6.1.9	Email
com.amazonaws:aws-java-sdk-secretsmanager	1.12.773	Email
org.acegisecurity:acegi-security	1.0.7	Fiscal
org.springdoc:springdoc-openapi-ui	1.7.0	Fiscal
com.google.guava:guava	31.0.1-jre	Fiscal
com.amazonaws:aws-java-sdk-secretsmanager	1.12.767	Fiscal
org.apache.activemq:activemq-client	5.15.8	GAGR
org.acegisecurity:acegi-security	1.0.7	GAGR
org.springdoc:springdoc-openapi-ui	1.7.0	GAGR
org.acegisecurity:acegi-security	1.0.7	Imaging
org.springdoc:springdoc-openapi-ui	1.7.0	Imaging
com.amazonaws:aws-java-sdk-core	1.12.162	Imaging
com.fasterxml.jackson.dataformat:jackson-dataformat-xml	2.9.8	Imaging
org.acegisecurity:acegi-security	1.0.7	Journal
org.springdoc:springdoc-openapi-ui	1.7.0	Journal
serverless	3.39.0	Journal
axios	1.7.2	Journal
com.fasterxml.jackson.dataformat:jackson-dataformat-xml	2.9.8	Journal
com.fasterxml.jackson.datatype:jackson-datatype-hibernate6	2.18.0	Journal
aws-sdk-client-mock	3.1.0	Journal

cordova-browser	5.0.4	Lobby
cordova-ios	4.5.5	Lobby
org.springframework.security.oauth:spring-security-oauth2	2.4.0.RELEASE	Lobby
org.springframework.ws:spring-ws-core	3.0.9.RELEASE	Lobby
@angular/compiler-cli	5.0.1	Lobby
cordova-android	7.0.0	Lobby
sw-toolbox	3.6.0	Lobby
org.acegisecurity:acegi-security	1.0.7	Lobby
@ionic/cordova-builders	11.0.0	Lobby
org.apache.tomcat.embed:tomcat-embed-jasper	10.1.25	Lobby
org.springdoc:springdoc-openapi-ui	1.7.0	Lobby
org.codehaus.jackson:jackson-mapper-asl	1.9.13	Lobby
ng-idle	1.3.2	Lobby
cordova-plugin-ionic-webview	1.2.1	Lobby
com.google.zxing:javase	3.2.1	Lobby
com.sun.xml.ws:jaxws-rt	3.0.2	Lobby
vue	3.5.4	Lobby
com.amazonaws:aws-java-sdk-secretsmanager	1.12.773	Lobby
org.acegisecurity:acegi-security	1.0.7	OCAT
org.springframework:spring-context-support	6.1.9	OCAT
org.springframework.boot:spring-boot-starter-web	3.4.0	OCAT
org.springframework.boot:spring-boot-starter-data-jpa	3.4.0	OCAT
io.swagger.core.v3:swagger-core	2.2.23	OCAT
com.amazonaws:aws-java-sdk-core	1.12.162	OCAT
org.springframework.ws:spring-ws-core	2.1.4.RELEASE	Portal
org.springframework.security.oauth:spring-security-oauth2	2.2.4.RELEASE	Portal
com.fasterxml.jackson.dataformat:jackson-dataformat-xml	2.9.8	Portal
org.springdoc:springdoc-openapi-ui	1.4.6	Portal
com.amazonaws:aws-java-sdk-core	1.12.162	Portal
org.springframework.ws:spring-ws-core	2.4.4.RELEASE	Portal
org.acegisecurity:acegi-security	1.0.7	Portal
org.codehaus.jackson:jackson-mapper-asl	1.9.13	Portal
commons-io:commons-io	2.6	Portal
org.springdoc:springdoc-openapi-ui	1.7.0	Portal
com.google.guava:guava	31.0.1-jre	Portal
com.amazonaws:aws-java-sdk-core	1.11.163	SMS
com.amazonaws:aws-java-sdk-secretsmanager	1.12.769	SMS
org.acegisecurity:acegi-security	1.0.7	SMS
org.springframework.boot:spring-boot-starter-web	3.4.0	SMS
org.springframework:spring-context-support	6.1.9	SMS
org.springframework:spring-jms	6.1.9	SMS
org.springframework.security.oauth:spring-security-oauth2	2.5.0.RELEASE	Tasks

org.springdoc:springdoc-openapi-ui	1.7.0	Tasks
org.springframework.security.oauth:spring-security-oauth2	2.5.2.RELEASE	Tasks
org.acegisecurity:acegi-security	1.0.7	Tasks
com.google.guava:guava	31.0.1-jre	Tasks
com.amazonaws:aws-java-sdk-secretsmanager	1.12.767	Tasks
com.fasterxml.jackson.core:jackson-core	2.12.6	Functional Analysis Tool
com.fasterxml.jackson.core:jackson-databind	2.12.6	Functional Analysis Tool
com.google.guava:guava	23.3-jre/31.0.1-jre	Functional Analysis Tool
com.google.protobuf:protobuf-java	3.11.4	Functional Analysis Tool
com.oracle:ojdbc7	12.1.0.2	Functional Analysis Tool
mysql:mysql-connector-java	8.0.28	Functional Analysis Tool
org.apache.bcel:bcel	6.0	Functional Analysis Tool
software.amazon.ion:ion-java	1.0.2	Functional Analysis Tool

1.1.2 CalSAWS Core, Batch & Webservice

Open Source Libraries	CalSAWS Version	Application Name
org.springframework:spring-context	5.3.32	CalSAWS Core Architecture
org.springframework.security:spring-security-config	5.7.5	CalSAWS Core Architecture
org.apache.activemq:activemq-client	5.16.0	CalSAWS Core Architecture
org.jibx:jibx-bind	1.2.3	CalSAWS Core Architecture
org.springframework.security:spring-security-web	5.7.5	CalSAWS Core Architecture
org.springframework.security.oauth:spring-security-oauth2	2.5.0.RELEASE	CalSAWS Core Architecture
org.apache.pdfbox:pdfbox	2.0.17	CalSAWS Core Architecture
com.github.dhorions:boxable	1.6	CalSAWS Core Architecture
dom4j:dom4j	1.6.1	CalSAWS Core Architecture
org.jibx:jibx-extras	1.2.3	CalSAWS Core Architecture
org.springframework:spring-webmvc	5.3.32	CalSAWS Core Architecture
com.thoughtworks.xstream:xstream	1.4.16	CalSAWS Core Architecture
org.quartz-scheduler:quartz	2.3.0	CalSAWS Core Architecture
net.sf.dozer:dozer	5.5.1	CalSAWS Core Architecture
org.postgresql:postgresql	42.5.4	CalSAWS Core Architecture
org.glassfish:javax.el	3.0.1-b12	CalSAWS Core Architecture
commons-httpclient:commons-httpclient	3.1	CalSAWS Core Architecture
org.bouncycastle:bcprov-jdk15on	1.64	CalSAWS Core Architecture
com.microsoft.graph:microsoft-graph	5.80.0	CalSAWS Core Architecture
com.microsoft.azure:adal4j	1.6.7	CalSAWS Core Architecture
org.springframework:spring-websocket	5.3.32	CalSAWS Core Architecture

org.springframework:spring-core	5.3.32	CalSAWS Core Architecture
org.springframework:spring-jdbc	5.3.32	CalSAWS Core Architecture
axis:axis	1.4	CalSAWS Core Architecture
org.mortbay.jetty:servlet-api	2.5-6.1H.14.1	CalSAWS Core Architecture
org.apache.poi:poi-ooxml	4.1.2	CalSAWS Core Architecture
com.thoughtworks.xstream:xstream	1.4.16	CalSAWS Core Architecture
org.jsoup:jsoup	1.10.3	CalSAWS Core Architecture
com.amazonaws:aws-java-sdk-core	1.12.162	CalSAWS Core Architecture
com.twelvemonkeys.imageio:imageio-tiff	3.3.1	CalSAWS Core Architecture
org.springframework.ws:spring-ws-core	3.1.6	CalSAWS Core Architecture
mysql:mysql-connector-java	8.0.31	CalSAWS Core Architecture
com.itextpdf:itext-core	8.0.5	CalSAWS Core Architecture
org.aspectj:aspectjweaver	1.8.10	CalSAWS Core Architecture
org.aspectj:aspectjrt	1.8.10	CalSAWS Core Architecture
org.hibernate:hibernate-entitymanager	6.0.0.Alpha7	CalSAWS Core Architecture
com.microsoft.azure:adal4j	1.6.7	CalSAWS Core Architecture
org.springframework:spring-expression	5.3.32	CalSAWS Core Architecture
org.apache.derby:derby	10.15.2.0	CalSAWS Core Architecture
<u>commons-io:commons-io</u>	2.13.0	CalSAWS Core Architecture
<u>commons-fileupload:commons-fileupload</u>	1.5	CalSAWS Core Architecture
net.sf.dozer:dozer	5.5.1	CalSAWS Core Application
taglibs:standard	1.1.2	CalSAWS Core Application
javax.servlet:jstl	1.2	CalSAWS Core Application
jcifs:jcifs	1.3.17	CalSAWS Core Application
org.quartz-scheduler:quartz	2.3.2	CalSAWS Core Application
javax.servlet:jstl	1.2	CalSAWS Core Application
org.springframework:spring-oxm	5.2.22.RELEASE	CalSAWS Core LRS Webservice
org.springframework.integration:spring-integration-core	5.3.10.RELEASE	CalSAWS Core LRS Webservice
org.springframework:spring-oxm	5.2.22.RELEASE	CalSAWS Core LRS Webservice Clients
org.jsonschema2pojo:jsonschema2pojo-gradle-plugin	1.2.1	CalSAWS Core LRS Webservice Clients

1.1.3 Lobby Kiosk Lobby Tablet & Functional Analysis Tool (FrontEnd)

Open Source Libraries	CalSAWS Version	Application Name
cordova-browser	5.0.4	Lobby(FACT)
cordova-ios	4.5.5	Lobby(FACT)
cordova-android	7.0.0	Lobby(FACT)
cordova-plugin-swift-support	3.1.1	Lobby(FACT)
ng-idle	1.3.2	Lobby(FACT)
Angular	1.8.3	Lobby(FACT)
angular/compiler-cli	5.0.1	Lobby(FACT)
Semver	5.4.1	Lobby(FACT)
ansi-regex	2.1.1	Lobby(FACT)
Lodash	3.10.1	Lobby(FACT)
Qs	6.5.1	Lobby(FACT)
Plist	2.1.0/1.2.0/2.0.1	Lobby(FACT)
Shelljs	0.2.6/0.5.3	Lobby(FACT)
XmlDom	0.1.27/0.1.31	Lobby(FACT)
body-parser	1.18.2	Lobby(FACT)
unset-value	1.0.0	Lobby(FACT)
Micromatch	2.3.11/3.1.10	Lobby(FACT)
cross-spawn	7.0.3	LobbyTablet2
http-proxy-middleware	2.0.6	LobbyTablet2
Undici	6.11.1/6.19.8	LobbyTablet2
path-to-regexp	0.1.7/1.8.0	LobbyTablet2
Inflight	1.0.6	LobbyTablet2
Underscore	1.8.3/1.9.1	Lobby(FACT)
Cookie	0.3.1	Lobby(FACT)
Vite	5.1.7	LobbyTablet2
Express	4.16.3	Lobby(FACT)
Braces	1.8.5	Lobby(FACT)
Minimatch	3.0.4	Lobby(FACT)
cordova-plugin-ionic-webview	1.2.1	Lobby(FACT)
angular/core	5.0.1	Lobby(FACT)
Rollup	4.21.2	Lobby(FACT)
Send	0.16.2/0.18.0	Lobby(FACT)
serve-static	1.13.2	Lobby(FACT)/ LobbyTablet2
Nanoid	3.3.7	LobbyTablet2
Cookie	0.6.0	LobbyTablet2
Acorn	5.5.3	Functional Analysis Tool
ajv	5.5.2/6.5.0	Functional Analysis Tool

ansi-html	0.0.7	Functional Analysis Tool
ansi-regex	2.1.1/3.0.0	Functional Analysis Tool
async	2.6.0	Functional Analysis Tool
babel-traverse	6.26.0	Functional Analysis Tool
body-parser	1.18.2	Functional Analysis Tool
braces	2.3.2/1.8.5	Functional Analysis Tool
browserify-sign	4.0.4	Functional Analysis Tool
browserslist	1.7.7/2.11.3	Functional Analysis Tool
chownr	1.0.1	Functional Analysis Tool
color-string	0.3.0	Functional Analysis Tool
content-type-parser	1.0.2	Functional Analysis Tool
cookie	0.3.1	Functional Analysis Tool
cross-spawn	5.1.0	Functional Analysis Tool
cryptiles	3.1.2	Functional Analysis Tool
css-what	2.1.0	Functional Analysis Tool
decode-uri-component	0.2.0	Functional Analysis Tool
deep-extend	0.4.2	Functional Analysis Tool
dns-packet	1.3.1	Functional Analysis Tool
dot-prop	4.2.0	Functional Analysis Tool
elliptic	6.4.0	Functional Analysis Tool
es5-ext	0.10.42	Functional Analysis Tool
eslint	4.10.0	Functional Analysis Tool
events	0.1.6	Functional Analysis Tool
express	4.16.3	Functional Analysis Tool
extend	3.0.1	Functional Analysis Tool
follow-redirects	1.4.1	Functional Analysis Tool
glob-parent	3.1.0	Functional Analysis Tool
got	6.7.1	Functional Analysis Tool
handlebars	4.0.11	Functional Analysis Tool
hawk	6.0.2	Functional Analysis Tool
hosted-git-info	2.6.0	Functional Analysis Tool
html-minifier	3.5.15	Functional Analysis Tool
http-proxy	1.17.0	Functional Analysis Tool
http-proxy-middleware	0.17.4	Functional Analysis Tool
inflight	1.0.6	Functional Analysis Tool
ini	1.3.5	Functional Analysis Tool
ip	1.1.5	Functional Analysis Tool
is-svg	2.1.0	Functional Analysis Tool
istanbul-reports	1.3.0	Functional Analysis Tool
Json5	0.5.1	Functional Analysis Tool
json-schema	0.2.3	Functional Analysis Tool
js-yaml	3.7.0/3.11.0	Functional Analysis Tool

kind-of	6.0.2	Functional Analysis Tool
loader-utils	0.2.17/1.1.0	Functional Analysis Tool
lodash.template	4.4.0	Functional Analysis Tool
lodash	4.17.5	Functional Analysis Tool
macaddress	0.2.8	Functional Analysis Tool
mem	1.1.0	Functional Analysis Tool
merge	1.2.0	Functional Analysis Tool
micromatch	3.1.10/2.3.11	Functional Analysis Tool
minimatch	3.0.3/3.0.4	Functional Analysis Tool
minimist	0.0.8/1.2.0	Functional Analysis Tool
mixin-deep	1.3.1	Functional Analysis Tool
node-fetch	1.7.3	Functional Analysis Tool
node-forge	0.7.5	Functional Analysis Tool
node-notifier	5.2.1	Functional Analysis Tool
nth-check	1.0.1	Functional Analysis Tool
path-parse	1.0.5	Functional Analysis Tool
path-to-regexp	0.1.7/1.7.0	Functional Analysis Tool
postcss	6.0.22/5.2.18	Functional Analysis Tool
qs	6.5.2/6.5.1	Functional Analysis Tool
querystringify	0.0.4	Functional Analysis Tool
react-dev-utils	5.0.1	Functional Analysis Tool
react-dom	16.2.0	Functional Analysis Tool
request	2.85.0	Functional Analysis Tool
semver	5.5.0	Functional Analysis Tool
sen	0.16.2	Functional Analysis Tool
serve-static	1.13.2	Functional Analysis Tool
set-value	0.4.3/2.0.0	Functional Analysis Tool
shell-quote	1.6.1	Functional Analysis Tool
sockjs	0.3.18	Functional Analysis Tool
stringstream	0.0.5	Functional Analysis Tool
tar	4.4.1	Functional Analysis Tool
tmpl	1.0.4	Functional Analysis Tool
tough-cookie	2.3.4	Functional Analysis Tool
trim-newline	1.0.0	Functional Analysis Tool
ua-parser-j	0.7.17	Functional Analysis Tool
uglify-js	3.3.25/2.8.29	Functional Analysis Tool
tmpl	1.0.4	Functional Analysis Tool
unset-value	1.0.0	Functional Analysis Tool
urijs	1.19.1	Functional Analysis Tool
url-pars	1.0.5/1.4.0	Functional Analysis Tool
webpack	3.8.1	Functional Analysis Tool
webpack-dev-middleware	1.12.2	Functional Analysis Tool

webpack-dev-server	2.9.4	Functional Analysis Tool
websocket-extensions	0.1.3	Functional Analysis Tool
whet.extend	0.9.9	Functional Analysis Tool
y18n	3.2.1	Functional Analysis Tool
yargs-parser	4.2.1/ 7.0.0/5.0.0	Functional Analysis Tool

1.2 Overview of Recommendations

The CalSAWS Online, Batch, WebService, and Spring-Boot applications will be compiled with the SNYK recommended libraries and will be deployed using the latest platform. Breaking changes should be resolved if the application code is using a deprecated API. The following applications will receive an upgrade based on the listed in section 1.1.1 and 1.1.2.

Application Name
AMP
Activities Service
Appointment Service
Fiscal Service
Imaging Service
Journal Service
CalSAWS Service
OCAT Service
Texting/SMS Client (Integrated in CalSAWS Application)
GAGR
Email Service
Portal Service
Task Service
Auditor
FileService
Kafka Producer Service
Lobby Service
Lobby Tablet
CHEWS
CalSAWS Core
CalSAWS Core - Batch
CalSAWS WebService
Functional Analysis Tool

1.3 Assumptions

- This upgrade should not change the functional behavior of the CalSAWS applications.

- In the case of potential runtime issue with upgraded libraries and if there are no alternative version, that specific libraries should be rolled back to the previous known working version.

2 RECOMMENDATIONS

This SCR will upgrade CalSAWS Applications open-source libraries to adhere SNYK compliance.

2.1 Security Updates

N/A

3 SUPPORTING DOCUMENTS

N/A

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

N/A

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

N/A

6 OUTREACH

N/A

7 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System



CA-286996

CalOAR - Update logic for WTW_CWEX
(Variable #53) per SIRFRA 4009

DOCUMENT APPROVAL HISTORY

Prepared By

Eric Delaney

Reviewed By

Chitra Barsagade, Howard Suksanti,
Shining Lu, Sunitha Sampathkumar

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

02/12/2025

1

Initial Draft

Eric Delaney

03/12/2025

1.1

Updated overview and
added full variable names

Eric Delaney

03/17/2025

1.2

Updated Assumptions

Eric Delaney

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CA-286996 – CalOAR - Update logic for WTW_CWEX (Variable #53) per SIRFRA 4009

1 OVERVIEW

WTW_CWEX (variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs) identifies individuals who did or did not participate in education while on CalWORKs assistance and who exited CalWORKs in the measurement period.

WTW_CWEX is part of the Cal-OAR 19E and is the denominator of the educational completion rate.

Update CalOAR logic for WTW_CWEX (Variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs).

This change is related to SIRFRA 4009 requested by CDSS.

1.1 Current Design

Existing CalOAR logic for WTW_CWEX (Variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs) follows the below criteria:

1. WTW_V_EN (Variable #41 - Enrolled in Any Approved Education or Training Activity or Program) = Yes; Prior to discontinuance individuals were enrolled in an Education program within measurement period.
2. WTW Program Status = 'Discontinued' or 'Sanctioned'
3. WTW program period is within the report period
4. CalWORKs Person Status went from 'Active' to 'Discontinued'
5. CalWORKs program period is within the report period

1.2 Requests

Update CalOAR WTW_CWEX (Variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs) criteria #2 to:

2. WTW/REP Program Status = 'Sanctioned' or 'Deregistered'

1.3 Overview of Recommendations

1. Update CalOAR WTW_CWEX (Variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs) criteria #2.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. Current Design refers to program as WTW program. The updated design refers to program as WTW/REP program. This program reference is not a requested

- code change but instead describes the existing code accurately while updating design to match.
3. There will be no change to preview reports, which will be confirmed by preview report regression test.

2 RECOMMENDATIONS

2.1 CalOAR Update Logic for WTW_CWEX (Variable #53)

2.1.1 Overview

WTW_CWEX (variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs) identifies individuals who did or did not participate in education while on CalWORKs assistance and who exited CalWORKs in the measurement period. WTW_CWEX is part of the Cal-OAR 19E and is the denominator of the educational completion rate. Update CalOAR logic for WTW_CWEX (Variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs).

2.1.2 Description of Change

1. Update CalOAR WTW_CWEX (Variable #53 - Former WTW Individuals who Participated in Education while on CalWORKs) criteria #2 to:
WTW/REP Program Status = 'Sanctioned' or 'Deregistered'

Example 1:

Assume WTW_V_EN (variable 41 - Enrolled in Any Approved Education or Training Activity or Program) returns 02 for the reporting period of July 2024 to December 2024. Say the WTW program has the following statuses:

- 'Active' with a begin date of 7/1/2024 and an end date of 8/31/2024
- 'Deregistered' with a begin date of 9/1/2024

For the July 2024 to December 2024 report, WTW_CWEX = 02.

Example 2:

Assume WTW_V_EN (variable 41 - Enrolled in Any Approved Education or Training Activity or Program) returns 02 for the reporting period of July 2024 to December 2024. Say the WTW program has the following statuses:

- 'Active' with a begin date of 7/1/2024 and an end date of 12/31/2024
- 'Deregistered' with a begin date of 1/1/2025

For the July 2024 to December 2024 report, WTW_CWEX = 01.

Example 3:

Assume WTW_V_EN (variable 41 - Enrolled in Any Approved Education or Training Activity or Program) returns 02 for the reporting period of July 2024 to December 2024. Say the WTW program has the following statuses:

- 'Sanctioned' with a begin date of 7/1/2024 and an end date of 8/31/2024
- 'Active' with a begin date of 9/1/2024

For the July 2024 to December 2024 report, WTW_CWEX = 01.

2.1.3 Partner Integration Testing

Yes.

After programming changes are made, CalSAWS will generate outbound CalOAR 19E test files for the July 2024 to December 2024 reporting period, which will be sent to CDSS. CDSS will review the files and send to a small cohort of counties to review and validate that the data is satisfactory.

2.1.4 Execution Frequency

No change.

2.1.5 Key Scheduling Dependencies

No change.

2.1.6 Counties Impacted

All counties.

2.1.7 Category

No change.

2.1.8 Data Volume/Performance

No change.

2.1.9 Interface Partner

California Department of Social Services (CDSS).

2.1.10 Failure Procedure/Operational Instructions

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Cal-OAR	Criteria tracker for Cal-OAR, with updates for WTW_CWEX	CA-286996 Cal-OAR Data Element Specifications Tracker.xlsx

Design

CA-287726

Update County_Dates Batch 10-day to be
Applicable for 00 (All) Counties

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Edgars Reinholds	
	Reviewed By	Chitra Barsagade, Michael Wu, Eric Wu, Norma Meza, Denise Barajas	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/19/2025	1.0	Initial Version	Edgars Reinholds

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CA-287726 – Update County_Dates Batch 10-day to be Applicable for 00 (All) Counties

1 OVERVIEW

Update Batch 10-day date to applicable to 00 (All) Counties.

1.1 Current Design

SCR CA-201813 Implemented County Calendar with important dates.

County Calendar includes the following Date Types:

- Batch 10 – day cutoff Dates
- Batch Discontinuance Dates
- County Holidays
- MEDS RECON
- MEDS Renewal Dates
- Main Payroll Dates – AAP
- Main Payroll Dates – Cash and Food
- Main Payroll Dates – Foster Care
- Main Payroll Dates – KG
- RE Packet Mailing Dates
- Release Dates

Batch 10-day cutoff date is the same for all counties. However, in the COUNTY_DATES table it is county specific, yet it is having the same value.

1.2 Requests

Update Batch 10-day cutoff date to be for a 00 county in COUNTY_DATES table, which would make it applicable for all counties.

1.3 Overview of Recommendations

1. Create a DCR to update County Calendar Batch 10-day cutoff date (Date Type = B1) to be 00 county (1 entry per month for all counties).
2. Update common County Dates logic to retrieve the Batch 10-day cutoff date for all counties.
3. Regression test B&I, CalHEERS, Fiscal, and Online County Calendar functionality.

1.4 Assumptions

1. None of the batch job functionality is changing. County 00 means that the record is applicable to all counties.
2. Only the Batch 10-day cutoff dates calendar is being updated with the SCR. All other County Calendar Date Types are unaffected.

2 RECOMMENDATIONS

2.1 Batch – Update common County Dates Logic

2.1.1 Overview

Update common County Dates logic to retrieve the Batch 10-day cutoff date for all counties.

2.1.2 Description of Change

1. Update common County Dates logic to retrieve the Batch 10-day cutoff date for all counties

2.1.3 Execution Frequency

No Change.

2.1.4 Key Scheduling Dependencies

No Change.

2.1.5 Counties Impacted

All Counties.

2.1.6 Category

N/A

2.1.7 Data Volume/Performance

N/A

2.1.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the

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

2.2 Data Change – Update Batch 10-day date to 00 County

2.2.1 Overview

Update County Calendar 10-day cutoff date (Date Type = B1) to be 00 county (1 entry per month for all counties).

2.2.2 Description of Change

1. Create a DCR to update County Calendar 10-day cutoff date (Date Type = B1) to be 00 county (1 entry per month for all counties).

2.2.3 Estimated Number of Records Impacted/Performance

2784 Records.

2.3 Regression Test County Dates Functionality

2.3.1 Overview

Regression test B&I, CalHEERS, Fiscal, and Online County Calendar functionality.

2.3.2 Description of Change

1. B&I
 - a. PB00E122 – FC Emergency Assistance Exceeded EDBC Sweep.
 - b. PB00E111 – Sync SNB With CF EDBC Sweep.
 - c. PB19E142 – CF Associated DCFS program EDBC Sweep.
 - d. PB00E913 – SCI Payment Discontinuance.
 - e. PB00E931 – SCI Payment Discontinuance for CalFresh.
2. CalHEERS
 - a. PB00E155 – Auto-Rescind MC EDBC Sweep.
3. Fiscal
 - a. Issuance Batch jobs.
4. Online
 - a. County Calendar functionality.

3 SUPPORTING DOCUMENTS

N/A

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT

4 OUTREACH

N/A

4.1 Lists

N/A

5 APPENDIX

N/A

Design

CA-287551

Update Specific Variable on MC No Change NOA

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Navyasri Yalamanchili	
	Reviewed By	GupthaRK	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
02/21/2025	1.0	Initial Document	Navyasri Yalamanchili

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CA-287751 – Update Specific Variable on MC No Change NOA

1 OVERVIEW

The purpose of this SCR is to update specific variable on the MC No Change NOA.

1.1 Current Design

Currently the Medi-Cal No Change NOA populates with a person's citizenship as "Undocumented" from the Citizenship Detail page as the Specific Variable.

1.2 Requests

1. Update the Specific Variable section on the NOA to not display the term 'undocumented' for the Citizenship/Immigration Status on the NOA and leave the field blank in MAGI NO CHANGE RENEWAL NOA with reason code H903A.
2. Update the Specific Variable section on the NOA to not display the term 'undocumented' for the Citizenship/Immigration Status on the NOA and leave the field blank in Non-MAGI NO CHANGE RENEWAL NOA with reason code M930A

1.3 Overview of Recommendations

1. Update the Specific Variable section on the NOA to not display the term 'undocumented' for the Citizenship/Immigration Status on the NOA and leave the field blank in MAGI NO CHANGE RENEWAL NOA with reason code H903A.
2. Update the Specific Variable section on the NOA to not display the term 'undocumented' for the Citizenship/Immigration Status on the NOA and leave the field blank in Non-MAGI NO CHANGE RENEWAL NOA with reason code M930A

1.4 Assumptions

1. There are no changes to the generation logic of the NOA.
2. The triggering conditions of the Common NOA Fragments for Threshold Generation remains unchanged.
3. The NOA template remains unchanged and is not being updated.
4. The existing variable population is being updated with this effort.

2 RECOMMENDATIONS

2.1 Update Specific Variable on MAGI NO CHANGE RENEWAL NOA with reason code H903A.

2.1.1 Overview

This effort will update specific variable on MAGI NO CHANGE RENEWAL NOA with reason code H903A for the existing languages.

Reason Fragment Name and ID: MC_H_NO_CHANGE_RENEWAL

(Fragment ID: 7005)

State Form/NOA: MC NO CHANGE RE

Current NOA Template: H_NOA_TEMPLATE

Current Program(s): Medi-Cal

Current Action Type: Approval

Include NA Back 9: Yes

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

2.1.2 Form Verbiage

N/A

2.1.3 Form/NOA Variable Population

Add/Update Fragment Variable Population

The CitizenshipStatus variable will be updated to Blank field if the selected term is "Undocumented".

Variable Name	Population	Formatting*
CitizenshipStatus	Null	Arial, Size 10

Technical Note: If citizenship status is populating as 'Undocumented' then it should be blank field.

2.1.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

2.2 Update Specific Variable on NON-MAGI NO CHANGE RENEWAL NOA with reason code M930A.

2.2.1 Overview

This effort will update specific variable on NON-MAGI NO CHANGE RENEWAL NOA with reason code M930A for the existing languages.

Reason Fragment Name and ID: MC_H_NO_CHANGE_RENEWAL

(Fragment ID: 7614)

State Form/NOA: MC NO CHANGE RE

Current NOA Template: MC_NOA_TEMPLATE

Current Program(s): Medi-Cal

Current Action Type: Approval

Include NA Back 9: Yes

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

2.2.2 Form Verbiage

N/A

2.2.3 Form/NOA Variable Population

Add/Update Fragment Variable Population

The CitizenshipStatus variable will be updated to Blank field if the selected term is "Undocumented".

Variable Name	Population	Formatting*
CitizenshipStatus	Null	Arial, Size 10

Technical Note: If citizenship status is populating as 'Undocumented' then it should be blank field.

2.2.4 Form/NOA Generation Conditions

No updates to existing trigger conditions.

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1.	NOA	MAGI NO CHANGE RENEWAL NOA	Magi_Mockup.pdf
2.	NOA	NON-MAGI NO CHANGE RENEWAL NOA	Non-Magi_Mockup.pdf

CalSAWS

California Statewide Automated Welfare System

A large graphic on the right side of the page features a stack of hands in various colors (blue, green, purple, etc.) forming a circle. Overlaid on this is a semi-transparent circle containing the text "THE POWER OF 58" in a stylized font. The number "58" is large and bold, with green tick marks radiating from it like a clock face. The background of the entire page is a light blue gradient with a large, abstract circular shape in shades of teal and blue on the right side.

THE
POWER
OF
58

CA-287766

Update GAGR Eligibility for Compacts of Free Association (COFA) Citizens

DOCUMENT APPROVAL HISTORY

Prepared By

Sridhar Mullapudi

Reviewed By

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

02/21/2025

1.0

Initial draft

Sridhar Mullapudi

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CA-287766 Update GAGR Eligibility for Compacts of Free Association (COFA) Citizens

1 OVERVIEW

1.1 Current Design

Applicants under COFA section codes for GAGR Automated solutions or GA (LA county) programs are eligible for the program.

1.2 Requests

1. Update GAGR eligibility for COFA section codes based on the CRFI responses for each county for Compacts of Free Association (COFA) Citizens as of March 9, 2024.

1.3 Overview of Recommendations

1. Update the COFA section codes eligibility determination for GAGR based on the CRFI responses for each of the GAGR county.

1.4 Assumptions

1. Impacts to CW, CF and RCA are implemented with SCR CA-282057 in 25.03 release. Changes implemented with SCR CA-282057 shall remain unchanged.

2 RECOMMENDATIONS

2.1 GA/GR - Citizenship Eligibility Updates

2.1.1 Overview

Update GAGR eligibility requirements for COFA section codes. Citizenship eligibility requirements for GAGR for each county is controlled through the database values stored in CT 10653. LA county GA eligibility requirements are determined through values stored in CT 360. Codes table shall be updated with the new section codes and its eligibility to the program for each county.

2.1.2 Description of Changes

Update EDBC logic to determine GA/GR eligibility for the following document type and section codes.

1. Create a CTCR to end date the existing row as of 3/8/2024, and insert new rows effective 3/9/2024 to update GAGR eligibility as of the date as follows:

County Code	<u>Document type: I-688B or I-765 or I-766</u> <u>Section Code:</u> 274a.12(a)(8) or A08	<u>Document type: I-94</u> <u>Section Code:</u> CFA/MIS	<u>Document type: I-94</u> <u>Section Code:</u> CFA/PAL	<u>Document type: I-94</u> <u>Section Code:</u> CFA/FSM
LA	Ineligible	Ineligible	Ineligible	Ineligible
ALA	Eligible	Eligible	Eligible	Eligible
CCS	Eligible	Eligible	Eligible	Eligible
FRS	Ineligible	Ineligible	Ineligible	Ineligible
ORG	Eligible	Eligible	Eligible	Eligible
PLA	Ineligible	Ineligible	Ineligible	Ineligible
SAC	Eligible	Eligible	Eligible	Eligible
SDG	Ineligible	Ineligible	Ineligible	Ineligible
SFO	Eligible	Eligible	Eligible	Eligible
SLO	Eligible	Eligible	Eligible	Eligible
SMT	Eligible	Eligible	Eligible	Eligible
SBR	Ineligible	Ineligible	Ineligible	Ineligible
SCL	Eligible	Eligible	Eligible	Eligible
SCZ	Eligible	Eligible	Eligible	Eligible

SOL	Ineligible	Ineligible	Ineligible	Ineligible
SON	Ineligible	Ineligible	Ineligible	Ineligible
TUL	Ineligible	Ineligible	Ineligible	Ineligible
VEN	Ineligible	Ineligible	Ineligible	Ineligible
YOL	Eligible	Eligible	Eligible	Eligible
San Bernadino	Eligible	Eligible	Eligible	Eligible

Technical Implementation Note: New row in CT360 for the above-mentioned section code, effective 03/09/2024, shall be available with the implementation of SCR CA-282057. CTCR in CT360 shall update the GA eligibility for LA county as mentioned above. Changes implemented with SCR CA-282057 shall remain unchanged.

2.1.3 Example Scenarios

None

2.1.4 Programs Impacted

GA, GR

2.1.5 Performance Impacts

N/A

Design

CA-288709

MEDS: No Longer Include SOC DE0719 with Aid Code
6G

DOCUMENT APPROVAL HISTORY

Prepared By

Howard Suksanti

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
3/19/2025	1.0	Initial Revision	Howard Suksanti

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

1 OVERVIEW

Per ACWDL 22-14 updated policy to reduce the 250% Working Disabled program (WDP) premium (aid code 6G) to zero, regardless of the net countable income.

1.1 Current Design

SCR CA-248427 updated MEDS transactions to send zero SOC (00000) for DE0719, when the aid code is 6G.

On 01-27-2025, DHCS issued Change Cycle Letter (CCL) 513 which excludes aid code 6G from SOC Case Summaries. MEDS now generates Alert 1094 when DE0719 is included in the transactions sent for aid code 6G.

1.2 Requests

1. No longer include Data Element (DE) 0719 with EW20 and RC20 MEDS transactions, when the Medi-Cal aid code is 6G.

1.3 Overview of Recommendations

1. Do not include DE0719 with EW20 and RC20 MEDS transactions when the Medi-Cal aid code is 6G.

1.4 Assumptions

1. N/A.

2 RECOMMENDATIONS

2.1 MEDS EW20 and RC20

2.1.1 Overview

EW20 transaction is used to add/Update Client Eligibility Record in MEDS.
FR20 transaction is for Reconcile Client Eligibility for program other than CalFresh.

2.1.2 Description of Change

1. Modify EW20 and RC20 to not send DE0719 (SOC AMOUNT) to MEDS when the aid code is 6G.

2.1.3 Partner Integration Testing

No.

2.1.4 Execution Frequency

No Change.

2.1.5 Key Scheduling Dependencies

No Change.

2.1.6 Counties Impacted

All Counties.

2.1.7 Category

Core-Off Prime.

2.1.8 Data Volume/Performance

N/A.

2.1.9 Interface Partner

MEDS.

2.1.10 Failure Procedure/Operational Instructions

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



California Statewide Automated Welfare System

Design

**CA-288893 - San Francisco - Run Batch
EDBC for Active cases having Inkind
Income**

DOCUMENT APPROVAL HISTORY

CalSAWS	Prepared By	Sharath Chandra Vijayakumar	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/21/2025	1.0	Initial Draft	Sharath Chandra Vijayakumar
03/24/2025	1.1	Updated the effective dates	Sharath Chandra Vijayakumar
04/03/2025	1.2	Updated the stat report field names	Sharath Chandra Vijayakumar

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1 OVERVIEW

Run Batch EDBC to apply new GA/GR Automated Solution program in-kind income values for San Francisco County effective May 1st, 2025.

1.1 Current Design

San Francisco County uses the GAGR Automated Solutions program In-kind income limits implemented effective from October 1st, 2024.

1.2 Requests

San Francisco County is requesting the project to run a Batch EDBC to apply the new GA/GR Automated Solution program in-kind income values effective May 1st, 2025. Run Batch EDBC for the 05/2025 for GA/GR Automated Solution and associated CalFresh (CF) and Nutrition Benefit (NB) programs on the same case.

1.3 Overview of Recommendations

1. Run Batch EDBC for benefit month of 05/2025 for active San Francisco County GA/GR Automated Solution programs which will include journal entries.
2. Run Batch EDBC for the benefit month of 05/2025 for active CF & NB programs on the same case as a GA/GR program from Recommendation 1 above for 05/2025 only which will include journal entries.
3. Generate exception listings for the county to review, and a success report with statistics of records processed.

1.4 Assumptions

1. Existing batch logic in CalSAWS skips programs with an overridden EDBC, Manual EDBC, a pending program, a pending person or yellow banner cases.
2. Per existing exception logic, batch EDBC run on programs where the existing EDBC for the month is Read-Only will not be authorized.
3. Counties can check 'yellow banner' programs daily on the latest Qlik report.
4. SCR CA-287218 will update code table in-kind income values for the San Francisco GA/GR Automated Solution program.
5. There are no Grant increase NOAs in the system currently for San Francisco which are triggered through EDBC run and hence no DCR is required in this batch run to not auto-generate any Grant increase NOAs.

2 RECOMMENDATIONS

2.1 Run Batch EDBC for GA/GR and CF/NB

2.1.1 Overview

Batch EDBC will run for the benefit month of 05/2025 for active San Francisco County GA/GR Automated Solution programs, CF and NB programs on the same case as the GA/GR program.

2.1.2 Description of Changes

1. Run batch EDBC for active GA/GR Automated Solution programs having in-kind income values with "Housing_Earned" as the type and "SSIP/CALM/PAES/AGEX" or "GA/GR" as sub-types in San Francisco County applicable for the benefit month of 05/2025.
 - a. Exclude the following:
 - i. A regular GA/GR EDBC has already been processed for the benefit month(s) since SCR CA-287218 was applied in Production.
 - ii. The GA/GR program has a 'Yellow Banner' (i.e., the high-dated EDBC has a source of 'Conversion').
 - iii. The benefit month is past the latest RE Due date for the GA/GR program.
 - b. Batch EDBC records will have a run type code of 'Single Program'.
 - c. The Run Reason 'GA/GR COLA' will be used.
 - d. The Sub Type 'GA/GR COLA' will be used.
 - e. Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for [month, year].
Long Description: Batch EDBC Ran for <Effective Month>.
Batch EDBC processed for the <Program Name> program for following reasons: GA/GR COLA
2. Run batch EDBC the benefit month of 05/2025 on active CF and NB programs on the cases processed in Recommendation 1 above.
 - a. Exclude the following:
 - i. The CF or NB program has a 'Yellow Banner' (i.e., the high-dated EDBC has a source of 'Conversion').
 - ii. The benefit month is past the latest RE Due date for the CF program.
 - iii. The SAR7 report status for the CF program is 'Generated', 'Sent', 'Received', or 'Incomplete'.
 - iv. The benefit month is past the latest RE due date.
 - b. Batch EDBC records will have a run type code of 'Targeted Program'.
 - c. The Run Reason 'GA/GR COLA' will be used.
 - d. The Sub Type 'GA/GR COLA' will be used.
 - e. Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for [month, year].
Long Description: Batch EDBC Ran for <Effective Month>.
Batch EDBC processed for the <Program Name> program
for following reasons: GA/GR COLA.

2.1.3 Programs Impacted

GA/GR Automated Solution
CF
NB

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1163	The LRS shall be capable of handling several types of mass updates, including table changes and regulatory changes.	This SCR will run the Batch EDBC to update the in-kind income values for San Francisco County GA/GR Automated Solution Program.

4 OUTREACH

4.1 EDBC Batch STATS Report

Generate a statistical report called "EDBC Batch STATS Report" that summarizes the EDBC count for each program included in the batch run for SF County and contains the following fields:

- County
- GA/GR EDBC Counts
- GA/GR EDBC Processed
- GA/GR EDBC Skipped (Exception)
- GA/GR EDBC Read Only
- GA/GR EDBC Stack Trace
- GA/GR Success Rate %
- CF EDBC Counts
- CF EDBC Processed
- CF EDBC Skipped (Exception)
- CF EDBC Read Only
- CF EDBC Stack Trace

- CF Success Rate %
- **Total EDBC Count (GA/GR +CF)**
- **Total EDBC Processed**
- **Total EDBC Skipped (Exception)**
- **Total EDBC Read Only**
- **Total EDBC Stack Trace**
- **Overall, Success Rate %**

NOTE: The columns in **bold** will include all programs in the batch. Also, CF and NB counts will be consolidated under one set of counts designated as 'CF'.

4.2 Lists

Generate lists for the county to review after batch EDBC completes. All lists will have the following standard columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

The following lists will be generated¹ with the standard columns shown above, plus any additional columns indicated:

1. **List Name:** List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".
Additional Column(s): Program Type, Program Closure Reason
2. **List Name:** List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person".
Additional Column(s): Program Type
3. **List Name:** List of cases where the GA/GR EDBC resulted in a benefit reduction. The case listing will be named "List of GA/GR Cases that Resulted in Benefit Reduction".
Additional Column(s): Include columns to indicate each benefit reduction type in a separate column (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change, Grant Amount (04/2025), Grant Amount (05/2025))
4. **List Name:** List of cases that resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC".
Additional Column(s): Program Type, Read-Only Reason
5. **List Name:** List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".

¹ **Note:** If no data exists for a given list, that list will not be generated. **Example:** if no GA/GR EDBC results in a reduction in benefits, list #3 will not be generated.

Additional Column(s): Skip Reason, Program Type

6. **List Name:** List of any case with an authorized EDBC from the batch run. The case listing will be named "List of Cases Processed in Batch Run".

Additional Column(s): Program Type

Lists and EDBC Batch Stat Report will be posted to: CalSAWS Web Portal > System Changes > SCR and SIR Lists > 2025 > CA-288893

5 APPENDIX

5.1 Batch Operations

- a) Run the driving query to insert the GA/GR automated solution program and CF/NB programs into SYS_TRANSACT table.
- b) Update the SYS_TRANSACT type to "BE1" for CF and NB programs.
- c) After the previous step b) completes, execute the batch job to run EDBC on all the SYS_TRANSACT records for the GR programs.
- d) After EDBC processing from step b) completes, update the SYS_TRANSACT type to "BE" for CF and NB programs.
- e) After the previous step d) completes, execute the batch job to run EDBC on all the SYS_TRANSACT records for CF/NB programs.

Design

CA-288949

MEDS ESAC Update for Foster Care Aid Code 40

DOCUMENT APPROVAL HISTORY

Prepared By

Howard Suksanti

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
4/8/2025	1.0	Initial Revision	Howard Suksanti

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CA-288949 – MEDS ESAC Update for Foster Care Aid Code 40

1 OVERVIEW

Update the exception eligibility logic in EW20 transaction to send ESAC 4 and 9 when an individual is eligible for aid code 40 and their age is greater than 216 months.

1.1 Current Design

SCR CA-278725 updated the list of Exception Eligibility aid codes to include Foster Care aid code 40. CalSAWS now sends an ESAC value of 4 or 9 when the individual's age in months exceeds 251.

1.2 Requests

According to Alert 1094-DISPLAYED DATA ELEMENTS CONTAIN CONFLICTING INFORMATION, the maximum age in months for aid code 40, is 216. Request exception eligibility ESACs 4 and 9 be sent when the age in months is greater than 216.

1.3 Overview of Recommendations

Update the exception eligibility logic in EW20 transaction to send ESAC 4 and 9 when an individual is eligible for aid code 40 and their age is greater than 216 months.

1.4 Assumptions

1. This SCR will update MEDS EW20 transaction only.

2 RECOMMENDATIONS

2.1 MEDS EW20

2.1.1 Overview

Currently, In CalSAWS the aid code 40 is considered as exception aid codes for which CalSAWS send EW20 transaction with ESAC 4 for continuing exception eligibility period and ESAC 9 for closed exception eligibility period.

2.1.2 Description of Change

1. Update the exception eligibility logic in EW20 transaction to send ESAC 4 and 9 when an individual is eligible for aid code 40 and their age is greater than 216 months.

2.1.3 Partner Integration Testing

No.

2.1.4 Execution Frequency

No Change.

2.1.5 Key Scheduling Dependencies

No Change.

2.1.6 Counties Impacted

All Counties.

2.1.7 Category

Core-Off Prime.

2.1.8 Data Volume/Performance

N/A.

2.1.9 Interface Partner

MEDS.

2.1.10 Failure Procedure/Operational Instructions

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



California Statewide Automated Welfare System

Design

CA-289387

Update CSF 170 Batch Logic to Not Generate for Foster Care programs

DOCUMENT APPROVAL HISTORY

Prepared By

Phong Xiong

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
04/02/2025	1.0	Initial Draft	Phong Xiong
04/09/2025	2.0	Updates as per committee feedback to include Child Care program to be excluded from batch generation	Phong Xiong

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CA-289387 – Update CSF 170 Batch Logic to Not Generate for Foster Care programs

1 OVERVIEW

1.1 Current Design

The CSF 170 was updated to have a daily batch job with SCR CA-279707 to generate the form for all primary applicants of a case regardless of the program.

1.2 Requests

Update the daily batch job for the CSF 170 to not generate for primary applicants with active Child Protective Services, Child Care, Foster Care, AAP, or Kin-GAP programs.

1.3 Overview of Recommendations

1. Update CSF 170 batch logic to exclude the following programs:
 - a. Foster Care,
 - b. AAP,
 - c. Kin-GAP
 - d. Child Care
 - e. Child Protective Services

1.4 Assumptions

1. There are no changes to the existing functionality of the form unless otherwise stated in this design document.
2. Foster Care programs does not have text notification functionality so the CSF 170 form is not required to be sent for those cases.

2 RECOMMENDATIONS

2.1 Update CSF 170 – Text Notification Form Recommendation

2.1.1 Overview

The CSF 170 is the agreement to receive text notifications from CalSAWS to the customer.

State Form: N/A – Non-State Form

Current Programs: All Programs

Current Attached Form(s): None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Existing Languages: English and Spanish

2.1.2 Form/NOA Verbiage

There are no changes to this section.

2.1.3 Form/NOA Variable Population

There are no changes to this section of the form.

2.1.4 Form/NOA Generation Conditions

1. Updates to Form Generation

Update the CSF 170 batch generation logic to generate with the following conditions:

- Program – Any program; excluding Child Care, Foster Care, AAP, and Kin-GAP
- Program Status – Active
- A CSF 170 was not previously sent for the case from the application date.
- The customer has not yet opted into text notification.
- The person is the primary applicant.

Batch Schedule: Daily

Notes:

- a. A customer who is currently active in multiple programs will receive only a single CSF 170.
- b. A customer who is currently active in multiple programs on the same case number, and one of those programs is either Child Care, Foster Care, AAP, or Kin-GAP; will not have the CSF 170 generated for that case.

- c. If a case has multiple primary applicants, each primary applicant will receive a CSF 170.
 - d. A customer must also have a phone number associated to their case.
- 2. Hide the following program from the CSF 170 Document Parameters when generated from the Template Repository:
 - a. Foster Care,
 - b. AAP,
 - c. Kin-GAP,
 - d. Child Care
 - e. Child Protective Services

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT

4 APPENDIX

The existing print and mailing options for the form are as follows:

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

Mailing Options:

Mail-To (Recipient): Mail to the primary applicant when generated via batch.

Mail to the customer's name selected from the document parameters dropdown when generated via Template Repository.

Mailed From (Return): Sending Office

Mail-back-to Address: County BRM address

Outgoing Envelope Type: Standard Envelope

Return Envelope Type: Pre-paid envelope

Additional Options:

Special Paper Stock: No

Enclosures: No

Electronic Signature:

Electronic Signature (IVR/Text): Yes

Check to Sign: Yes

Post to Self Service Portal: Yes

CalSAWS

California Statewide Automated Welfare System



CA-289562

RPA EBT/BIC Exception - Create New Task Category
and New Task Type

DOCUMENT APPROVAL HISTORY

Prepared By

Vallari Bathala

Reviewed By

Sarah Rich, Dymas Pena, Inez Finnigan,
Carlos Albances, Michael Wu

DATE

VERSION

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AUTHOR

04/04/2025

1.0

Initial Revision

Vallari Bathala

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CA-289562 – RPA EBT/BIC Exception - Create New Task Category and New Task Type

1 OVERVIEW

This design outlines modifications to Task Management functionality within the CalSAWS System to create a new Task Category and Task Type which will be utilized by the Robotic Process Automation (RPA) processing.

1.1 Current Design

Currently, the EBT Card/BIC requests from Benefits Cal are processed manually by County staff members. SCR CA-285047 will automate the Automate EBT Card/BIC requests from BenefitsCal using Robotic Process Automation (RPA), including the creation of Tasks for EBT/BIC exceptions. However, a Task Category and Task Type specific to the RPA does not currently exist within Task Management.

1.2 Requests

1. Create new Task Category and Task Type specific to the RPA processing.

1.3 Overview of Recommendations

1. Create a data change to create a new Robotic Process Automation Task Category.
2. Create a data change to create a new EBT BIC Exception Task Type.

1.4 Assumptions

1. SCRs CA-285887 and CA-285047 detail steps which the RPA processing will take to utilize the new Task Category and Task Type specified in this document to create Tasks.
2. The new Task Category will automatically be displayed in Task Categories panel in Bank Detail page.
3. The new Task Category will automatically be displayed in Tasks panel in Position Detail page.
4. The new Task Category and Task Type cannot be removed from the Task Category and Task Type List pages.

2 RECOMMENDATIONS

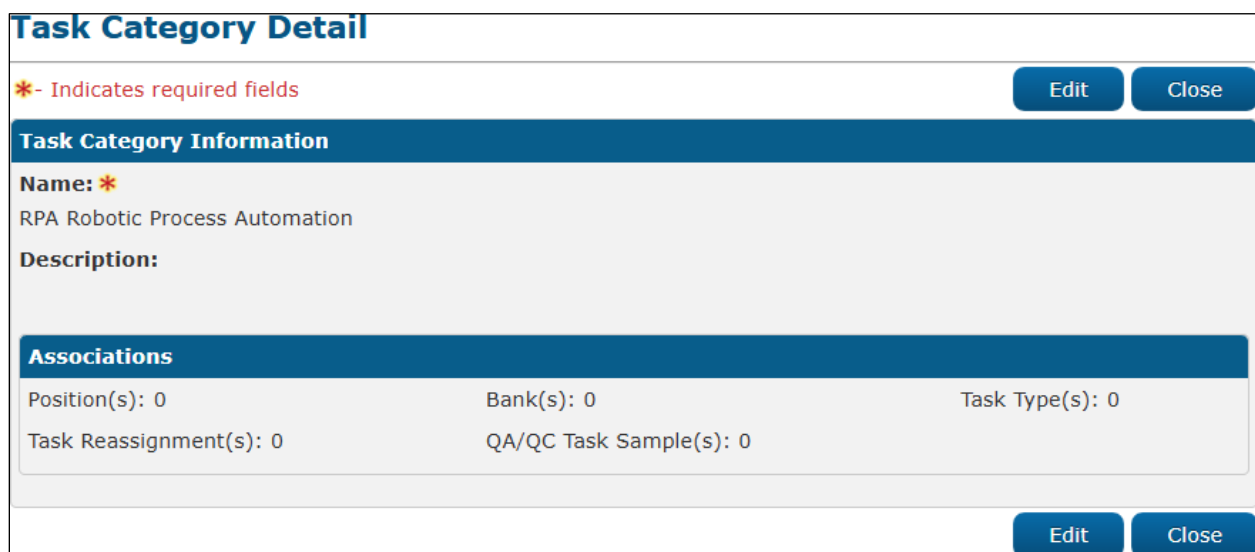
This section will outline recommendations to introduce a Task Category and Task Type specific to RPA.

2.1 Task Category Detail

2.1.1 Overview

This section will outline recommendations to add a Task Category for all Counties.

2.1.2 Task Category Detail Mockup



Task Category Detail

*- Indicates required fields

Task Category Information

Name: *
RPA Robotic Process Automation

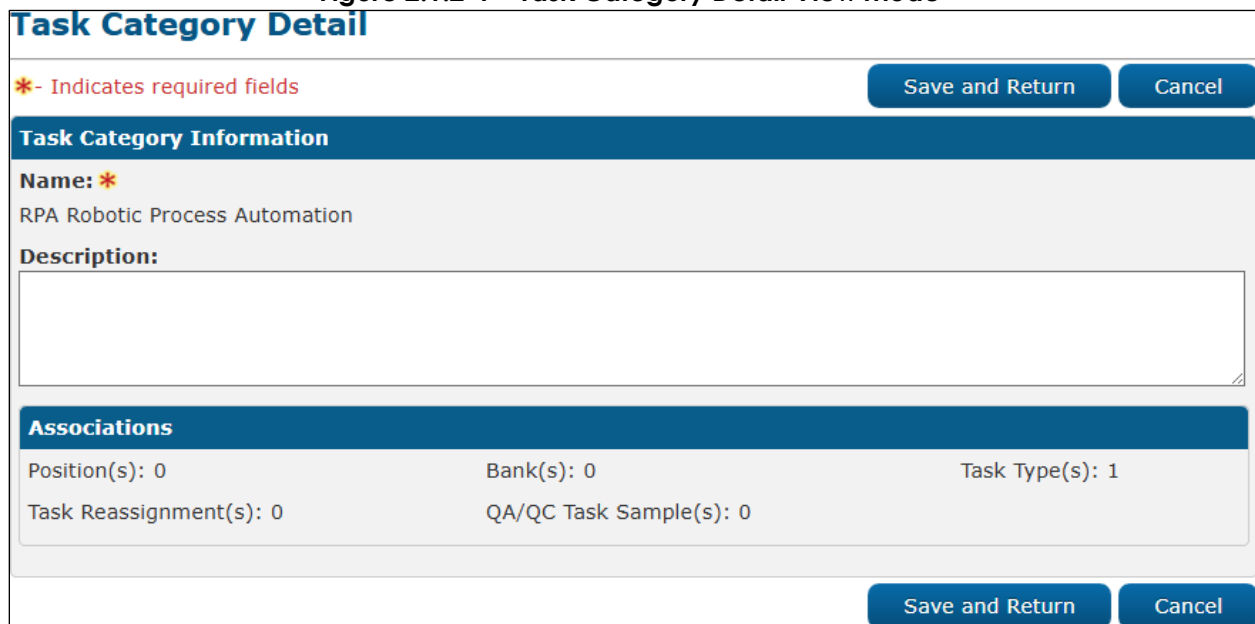
Description:

Associations

Position(s): 0	Bank(s): 0	Task Type(s): 0
Task Reassignment(s): 0	QA/QC Task Sample(s): 0	

Edit Close

Figure 2.1.2-1 – Task Category Detail View Mode



Task Category Detail

*- Indicates required fields

Task Category Information

Name: *
RPA Robotic Process Automation

Description:

Associations

Position(s): 0	Bank(s): 0	Task Type(s): 1
Task Reassignment(s): 0	QA/QC Task Sample(s): 0	

Save and Return Cancel

Figure 2.1.2-2 – Task Category Detail Edit Mode

2.1.3 Description of Changes

1. Create the following Task Category for each County
 - a. Name: RPA Robotic Process Automation
 - b. Description: BLANK
 - c. Only the "Description" text box will be editable for this new Category.
 - d. The new Category cannot be deleted from the Task Category list page.

2.1.4 Page Validations

N/A

2.1.5 Page Location

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

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

2.1.6 Security Updates

N/A

2.1.7 Page Mapping

N/A

2.1.8 Accessibility

None.

2.1.9 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.2 Task Type Detail

2.2.1 Overview

This section will outline recommendations to add a Task Type for all Counties.

2.2.2 Task Type Detail Mockup

Task Type Detail

*- Indicates required fields

Close

Task Type Information

Name: *

EBT BIC Exception

Category: *

RPA Robotic Process Automation

Priority:

Critical

Available Online:

Yes

Available for Automation:

No

Instructions:

Expire Tasks: *

No

Newly Assigned Indicator: *

Tasks display indicator for 5 day(s)

Sub-Type Information

Name	Available Online	Available for Automation	Priority	Task Expiration
No Data Found				

Append Information

Action Step Information

Resulting Task Information

Staff Classification Information

Close

This Type_1 page took 0.23 seconds to load.

Figure 2.2.2-1 – Task Type Detail View Mode

2.2.3 Description of Changes

1. Create the following Task Type for each County
 - a. Name: EBT BIC Exception
 - b. Category: RPA Robotic Process Automation
 - c. Priority: Critical
 - d. Available Online: Yes
 - e. Available for Automation: No
 - f. Instructions: BLANK
 - g. Expire Tasks: No

- h. Newly Assigned Indicator: Tasks display indicator for 5 day(s)
- i. The new Task Type cannot be deleted from the Task Type list page

2.2.4 Page Validations

N/A

2.2.5 Page Location

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

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

2.2.6 Security Updates

N/A

2.2.7 Page Mapping

N/A

2.2.8 Accessibility

None.

2.2.9 Page Usage/Data Volume Impacts

There are no expected page usage/data volume impacts.

2.3 Automated Regression Test

2.3.1 Overview

Create new automated regression test scripts to verify the existence and field-specific editability of the "Robotic Process Automation" Task Category and "EBT BIC Exception" Task Type.

2.3.2 Description of Change

1. Create a new regression script to verify the static details of the "Robotic Process Automation" Task Category, and that the "Description" field is editable for this record on the Task Category Detail page.
2. Create a new regression script to verify the static details of the "EBT BIC Exception" Task Type, and that no "Edit" button displays for this record on the Task Type Detail page.

3 SUPPORTING DOCUMENTS

N/A

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	<ol style="list-style-type: none">1. Create a data change to create a new Robotic Process Automation Task Category.2. Create a data change to create a new EBT BIC Exception Task Type.

5 OUTREACH

N/A

6 APPENDIX

N/A