CalSAWS

California Statewide Automated Welfare System

Design

CA-241636

Update MC 360 to handle more HH members

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Ramon Villarreal-Leal	
	Reviewed By		
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
2/27/25	1.0	Draft Design	Ramon Villarreal-Leal
4/11/25	1.1	Updates as per BA comments	Ramon Villarreal-Leal
4/22/25	1.2	Updates to the MC 360 mockup by removing "Property Verification" Checkbox	Ramon Villarreal-Leal
05/08/2025	2.0	Design Clarification – Updated Request and Recommendation section to include the changes for removing "Property Verifications…" checkbox	Phong Xiong

Table of Contents

CA-241636 – Update MC 360 to handle more HH members

1 OVERVIEW

This effort is to update MC 360 to handle more Household (HH) members.

1.1 Current Design

MC 360 does not include all aided HH members on the form. MC 360 has enough entries for 5 members however does not allow for more than 5 members.

1.2 Requests

C-IV allowed all HH members to be listed on the MC 360, extending to the second page. Add similar functionality to CalSAWS by dynamically allowing more than 5 HH members to be listed. There should not be property verbiage on the form as property verification is no longer required for MC. Remove Property Verification verbiage from the form.

1.3 Overview of Recommendations

1. Update the current form to dynamically allow additional HH members.
2. Remove the "Property Verifications or MC 176 P" Checkbox from Documents in Transfer Packet section of the form.

1.4 Assumptions

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

2 RECOMMENDATIONS

2.1 Update MC 360 to handle more HH members

2.1.1 Overview

Update MC 360 to handle more HH members

State Form: MC 360 (06/07)
Current Programs: Medi-Cal
Current Attached Forms: None
Current Forms Category: Forms
Current Template Repository Visibility: All Counties
Existing Languages: English

2.1.2 Form/NOA Verbiage

Update MC 360 XDP
1. Update the form XDP to allow dynamic rows to be populated for the table that displays Name, Aid Code, Income, and Share-of-Cost based on the number of Household members.
2. Remove the "Property Verifications or MC 176 P" Checkbox from Documents in Transfer Packet section of the form.

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form/NOA Variable Population

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository Population	Population with Form Generation
NAME_1	Populates the name of the beneficiary / customer.	Text / Arial 10	Yes / Text	Yes	Yes
AID_CODE_1	Populates with the Aid Code depending on case	Text / Arial 10	Yes / Text	Yes	Yes

INCOME_1	Populates with income of person	Text / Arial 10	Yes / Numbers	Yes	Yes
SOC_1	Populates the Share of cost	Text / Arial 10	Numbers	Yes	Yes

The four variables above are dynamically populated and currently on the form there are five static rows. As per section 2.1.2 the form is updated for additional household members to be populated. Those additional household members will follow the variable population logic in the table above.

2.1.4 Form/NOA Generation Conditions

1. **Form Print/Mailing Options for MC 360**

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

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

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

3   SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOAs	MC 360 English form mockup	MC360_EN.pdf

CalSAWS

California Statewide Automated Welfare System

Design

CA-274508

Homeless-Temporary EDBC Checks Eligibility of Household in CalWORKs

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Yale Yee, Gerald Limbrick
	Reviewed By	Business Analyst, Build Team, Test Team, CW/CF Committee, QA Team

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
7/9/2024	1.0	Initial Draft	Yale Yee
8/7/2024	2.0	CW/CF committee comments –updated/added assumptions to SCR references and examples are added for denied/discontinued/ineligible scenarios	Yale Yee
10/31/2024	3.0	Updated document to remove RCA references	Yale Yee
2/13/2025	4.0	CW/CF committee comments – add recommendations for ICT cases. Additionally, recommendations for batch are also added.	Yale Yee

Table of Contents

CA-274508 – Homeless-Temporary EDBC Checks Eligibility of Household in CalWORKs

1 OVERVIEW

1.1 Current Design

1. When adding a Homeless-Temporary (HT) or Homeless-Permanent (HP) program to a new or existing case, there is validation that requires a CalWORKs (CW) or Refugee Cash Assistance (RCA) program be added to the case.

2. When running a HT EDBC, an applicant may be eligible to HT benefits when a CalWORKs (CW) or Refugee Cash Assistance (RCA) program exists on the case. The person status in CW/RCA is not considered when the HT EDBC is run.
   An applicant may be eligible to HT benefits when they are denied, discontinued or ineligible in CW/RCA for dates that overlap the period of the Payment Begin Date and Payment End Date of HT.

3. When running a HP EDBC and CW/RCA is Pending, there is a validation on the Run EDBC page to select both HP and CW/RCA.
   CA-201573 and CA-254466 implemented logic to skip the HP validation and evaluate benefits when the ICT status is 'In-Process' and the CW program is 'Pending' on the receiving County case.

4. HT and HP programs include RCA EDBC determinations when calculating EDBC results when RCA is on the same case.

5. HT program is not automatically closed when the CW program is not pending or active.

1.2 Requests

1. When adding an HT or HP program to a new or existing case, update the validations to only require CalWORKs program.

2. When running an HT EDBC, the household is not eligible to HT benefits when the CW program is denied, discontinued, or ineligible for dates that overlap the period of the Payment Begin Date and Payment End Date of HT.

3. HT EDBC evaluates benefits when specific ICT conditions are met.

4. HP EDBC evaluates benefits when additional ICT conditions are met.

5. When running an HP EDBC with a Pending CW/RCA, update the validation on the Run EDBC page to remove the reference to RCA.

6. Applicants or recipients of RCA are not eligible to HA programs.

7. Add a new batch job to close HT program when CW program is not active or pending.

1.3 Overview of Recommendations

1. Update the Select Programs page to require CalWORKs program when selecting Homeless Temp or Homeless Perm.
2. Update the Homeless – Temp Detail/Homeless – Perm Detail pages to require a CalWORKs program to exist on the case to add the Homeless-Temp record or Homeless-Perm record.
3. Update HT EDBC to fail HT benefits when the household is denied, discontinued or ineligible for CW for dates that overlap the period of the Payment Begin Date and Payment End Date of HT.
4. Update HT EDBC to evaluate the program for eligibility when specific ICT conditions are met.
5. Update HP EDBC to evaluate the program for eligibility when additional ICT conditions are met.
6. Update the validation for HP on the Run EDBC page to remove references to RCA.
7. Update HT and HP EDBC calculations to remove references to RCA.
8. Update the RCA EDBC to fail a person when the person receives CW benefits in the same benefit month.
9. When CW program is not active or pending for a case, add logic to trigger batch EDBC to close HT program on that case.

1.4 Assumptions

1. Changes made to Eligibility of CalWORKs as part of this effort will not affect generation of denial or discontinuance notices for Homeless-Temporary. Regression testing will be conducted to ensure that the notices continue to generate after the changes are implemented.
2. The person-level HT eligibility to determine an apparently eligible AU based on CW implemented with CA-235210 will not be impacted by this change.
3. While the ability to run HP and HT for CW ICT's is changing, the EDBC logic for benefit determination of the programs will not be impacted by this change.
4. Batch skip reasons will not be impacted by this change.
5. When HT benefits have been issued while the CW program is pending and the CW program is subsequently ran and denied, the HT benefits will not result in an overpayment.
6. The HP logic to skip the Pending CalWORKs validation when an ICT is In-Process implemented with CA-254466 and CA-201573 will not be impacted by this change.
7. Approval NOAs (M44-211A) and Denial NOAs (M44-211D) are generated for HT; Discontinuance NOAs are not generated for HT.
8. All existing functionalities will not change unless called out as part of this SCR.

2 RECOMMENDATIONS

2.1 Select Programs page

2.1.1 Overview

The Select Programs page is used to select, only, the first program or programs to be added to a new CalSAWS Case. Update the Select Programs page validation messages and validation logic.

2.1.2 Select Programs Page Mockup

Figure 2.1.2.1 - Select Programs Page Validation Message

2.1.3 Description of Changes

1. Update the following validation messages found on the Select Programs page:
   a. Update the existing validation message: "**Homeless - Perm - This Program requires either CalWORKs or RCA.**" to "**Homeless - Perm - This program requires CalWORKs.**"
   - Validation will be triggered when the user clicks on the "Select" button and "Homeless – Perm" is selected but the CalWORKs program is not selected as well.
   b. Update the existing validation message: "**Homeless - Temp - This Program requires either CalWORKs or RCA.**" to "**Homeless - Temp - This program requires CalWORKs.**"
   - Validation will be triggered when the user clicks on the "Select" button and Homeless – Temp is selected but the CalWORKs program is not selected as well.
   Technical note: See SelectProgramsValidation.java, ProgramDetailCustomValidation.java and errormessages.properties.CRPD165
   Technical note: The RCA logic when triggering the validation is removed.

2.1.4 Page Location

- **Global: Case Info**
- **Local: New Application >** (Complete the intermediate pages to add a Person to a New Case) **>** Click 'Add' to add a Program on the New Programs Detail page
- **Task: N/A**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

This page has been assessed for accessibility opportunities and no updates are required. **Note**: Task navigation accessibility opportunities will be addressed with SCR CA-281355.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Homeless - Temp Detail / Homeless – Perm Detail Page

2.2.1 Overview

The Program Detail page is re-named dynamically based on the program being viewed. The Program detail page is used to add, additional, programs to an existing CalSAWS Case. Update the Homeless - Temp Detail / Homeless – Perm Detail Page validation messages and validation logic.

2.2.2 Homeless - Temp / Homeless - Perm Detail Page Mockup

Figure 2.2.2.1 Homeless – Temp / Homeless - Perm Detail Page Validation Message

2.2.3 Description of Changes

1. Update the Validation logic on the Homeless – Temp / Homeless - Perm Detail page:
   a. Update the existing validation message from: "**Select Program - This Program requires either CalWORKs or RCA.**" to: "**Select Program - This program requires CalWORKs**.
   b. Validation will be triggered when the user clicks on "Go' and the 'Select Program' field is "Homeless – Temp" or "Homeless – Perm" and there is no CalWORKs program on the Case.
   Technical note: See ProgramDetailCustomValidation.java and errormessages.properties.CRPD165
   Technical note: The RCA logic when triggering the validation is removed.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

This page has been assessed for accessibility opportunities and no updates are required. **Note**: Task navigation accessibility opportunities will be addressed with SCR CA-281355.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Update HT EDBC to Check Eligibility of CW Household

2.3.1 Overview

When running a HT EDBC, the household is not eligible to HT benefits when they are denied, discontinued, or ineligible in CW program for dates that overlap the period of the Payment Begin Date and Payment End Date of HT.

Note: Section 2.9 addresses an exception when specific ICT criteria is met.

2.3.2 Description of Changes

Update HT EDBC to evaluate the Payment Begin Date and Payment End Dates on the Homeless Temp detail page and compare the status of the CalWORKs program for the overlapping period. For instances when HT is run and the CW program is in denied, discontinued, or ineligible status, fail the HT for 'Not Eligible for Cash Aid'.

2.3.3 Example Scenarios

N/A

2.3.4 Programs Impacted

Homeless-Temporary

2.3.5 Performance Impacts

N/A

2.4 Update HT EDBC to Remove Eligibility Determinations for RCA

2.4.1 Overview

When running a HT EDBC, a person is not eligible to HT benefits when they are active on RCA and not eligible in CW for dates that overlap the period of the Payment Begin Date and Payment End Date of HT.

2.4.2 Description of Changes

Update HT EDBC to assign the reason "No Apparent CW Elig." when a person is active in the RCA program and not eligible in CW for dates that overlap the period of the Payment Begin Date and Payment End Date of HT.

Note: Other persons on the HT program may be eligible to HT benefits if they are Pending or Active on CW.

2.4.3 Example Scenarios

N/A

2.4.4 Programs Impacted

Homeless-Temporary

2.4.5 Performance Impacts

N/A

2.5 Update HP EDBC to Remove Eligibility Determinations for RCA

2.5.1 Overview

When running an HP EDBC, a person is not eligible to HP benefits when they are active on RCA and not eligible in CW for dates that overlap the period of the Begin Date and End Date of HP.

2.5.2 Description of Changes

Update HP EDBC to assign the reason "No Apparent CW Elig." when a person is active in RCA program and not eligible in CW for dates that overlap the period of the Begin Date and End Date of HP.

Note: Other persons on the HP program may be eligible to HP benefits if they are Pending or Active on CW.

2.5.3 Example Scenarios

N/A

2.5.4 Programs Impacted

Homeless-Permanent

2.5.5 Performance Impacts

N/A

2.6 Update RCA EDBC to Check Eligibility of Applicant in CW

2.6.1 Overview

When running an RCA EDBC, a person is not eligible to RCA benefits when they are active on CW in the same benefit month.

Note: A list of Citizenship Types eligible to both CW and RCA is attached in Section 3 Appendix.

2.6.2 Description of Changes

Update RCA EDBC to fail an individual with the reason 'Gets CalWORKs' when the individual is active on CW for the same benefit month that RCA EDBC is run.

2.6.3 Example Scenarios

N/A

2.6.4 Programs Impacted

RCA

2.6.5 Performance Impacts

N/A

2.7 Update HP Validation on Run EDBC page

2.7.1 Overview

A CW program cannot be Pending when running an HP EDBC unless specific ICT criteria is met. A validation is displayed when running EDBC for HP while the CW program is in pending status.

Note: Section 2.8 addresses an exception when specific ICT criteria is met.

2.7.2 Description of Changes

The validation is updated to remove the reference to RCA and reworded for clarity.

Update the existing validation message
from:
"CalWORKs/RCA Program cannot be Pending to run Homeless-Perm EDBC. Click Run EDBC and select both CalWORKs/RCA and Homeless-Perm programs then Run EDBC."

to:
"When CalWORKs is Pending, Homeless-Perm EDBC cannot be run. Click Run EDBC and select both CalWORKs and Homeless-Perm programs, then Run EDBC."

Technical note: The RCA logic when triggering the validation is removed.

Run EDBC

✱- Indicates required fields   [Change Reason] [Cancel]

Benefit Processing Range:

Begin Month: ✱   **End Month: ✱**
[01/2025 ▾]   [05/2025 ▾]

☐	Program	Status	Timely Notice Exception	Reason	Run Reason
☑	Homeless - Perm	Pending			
☐	CalWORKs	Pending			

When CalWORKs is Pending, Homeless-Perm EDBC cannot be run. Click Run EDBC and select both CalWORKs and Homeless-Perm programs then Run EDBC.

Figure 2.6.2.1 Run EDBC Validation Message for Homeless-Perm

2.7.3 Example Scenarios

N/A

2.7.4 Programs Impacted

Homeless-Permanent

2.7.5 Performance Impacts

N/A

2.8 Update HP EDBC with Additional ICT Criteria

2.8.1 Overview

Current HP EDBC rules prevent the EDBC hard validation when the following are true:
1. Source of the CW/RCA program is 'ICT' on the receiving County case.
2. The most recent status for the ICT is "In-Process" and the Status Date is not more than 90 days ago.
3. CW/RCA is in 'Pending' status on the receiving County case.

Update ICT criteria to evaluate benefits on an HP EDBC when the ICT is complete and the current month is Denied due to being eligible in the sending County, whereas CW is approved for a future month in the receiving County.

2.8.2 Description of Changes

1. Update HP EDBC to grant benefits when the following are conditions are met:
    a. Source of the CW program is 'ICT' on the receiving County case.
    b. The most recent status for the ICT is 'In-Process' and Status Date is not more than 90 days ago; **or**
    c. The most recent status for the ICT is 'Complete' and both of the following are true:
        i. The CW program is 'Denied' on the case for the same benefit month of HP application and the ICT Status Date is not more than 90 days ago.
        ii. The CW program is 'Active' on the same case for a future month.
2. Remove the reference of RCA in the existing validation logic for a 'Pending' ICT status.

    Note: An ICT status is changed to 'Complete" with a nightly batch run after all the ICT programs have been run by EDBC.

2.8.3 Example Scenarios

N/A

2.8.4 Programs Impacted

Homeless-Permanent

2.8.5 Performance Impacts

N/A

2.9 Update HT EDBC with ICT Criteria

2.9.1 Overview

There is currently no exception logic to evaluate HT for instances when the CW program is being ICT'd and the ICT has been completed with a future active date for the CW program.

Update HT EDBC to evaluate benefits when the ICT is complete and the current month is Denied due to being eligible in the sending County, whereas CW is approved for a future month in the receiving County.

2.9.2 Description of Changes

Update HT EDBC to evaluate benefits when the following are conditions are true:

- a. Source of the CW program is 'ICT' on the receiving County case.
- b. The most recent status for the ICT is 'Complete' and both of the following are true:
    - i. The CW program is 'Denied' on the case for the same benefit month of HT application and the ICT Status Date is not more than 90 days ago.
    - ii. The CW program is 'Active' on the same case for a future month.

2.9.3 Example Scenarios

N/A

2.9.4 Programs Impacted

Homeless-Temporary

2.9.5 Performance Impacts

N/A

2.10   Remove Existing References of RCA in HP Rules

2.10.1 Overview

An RCA applicant/recipient is not eligible to HP benefits.

2.10.2 Description of Changes

Update HP EDBC rules to remove any RCA conditions or dependencies for eligibility to the HP program.

2.10.3 Example Scenarios

N/A

2.10.4 Programs Impacted

Homeless-Permanent

2.10.5 Performance Impacts

N/A

2.11   Remove Existing References of RCA in HT Rules

2.11.1 Overview

An RCA applicant/recipient is not eligible to HT benefits.

2.11.2 Description of Changes

Update HT EDBC rules to remove any RCA conditions or dependencies for eligibility to the HT program.

2.11.3 Example Scenarios

N/A

2.11.4 Programs Impacted

Homeless-Temporary

2.11.5 Performance Impacts

N/A

2.12 Create new monthly job to trigger EDBC on HT when CW is not active

2.12.1 Overview

Currently, there is no batch to close HT programs when there is no pending or active CW program on the case.

2.12.2 Description of Change

Add a new monthly batch job to trigger EDBC on HT program when the following is true:

    a. CW program status is not pending or active in the batch run month or a future month.

Batch EDBC Sweep	Description
New/Update	New
Sub Type Code	CT 942 ; The short description of CT 942 will be displayed in the Journal Entry.
Trigger Conditions	1. HT program is active as of the batch date. 2. CW Program is not pending or active as of the batch date or a future month.
Batch EDBC Mode	Single Program
Run RSN Code	N/A
Negative Action Code	N/A
Benefit Months	N/A
Note: Existing Cases	Future come-up months.

Journal Entry	Description
New/Update	New
Journal Category	All
Journal Type	Batch EDBC
Short Description	Batch EDBC ran for <Month Year>.
Long Description	Batch EDBC ran for <Month Year>. Batch EDBC processed to discontinue HT program due to inactive CW program.

2.12.3 Execution Frequency

Monthly batch run on the 1st of the month.

2.12.4 Key Scheduling Dependencies

Before EDBC Processing job

2.12.5 Counties Impacted

All Counties

2.12.6 Category

Core

2.12.7 Data Volume/Performance

N/A

2.12.8 Failure Procedure/Operational Instructions

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

2.13 Automated Regression Test

2.13.1 Overview

Create automated regression test scripts to verify the validation messages and EDBC logic when adding and approving Homeless-Temp and Homeless-Perm programs.

2.13.2 Description of Change

1. Create regression scripts to verify the following validation messages.
   a. Adding a Homeless-Temp and Homeless-Perm program to a new case without also adding a CalWORKs program.
   b. Adding a Homeless-Temp and Homeless-Perm program to an existing case without a CalWORKs program.
   c. Running EDBC for Homeless-Perm without also selecting the CalWORKs program.
2. Create regression scripts to verify the EDBC scenarios detailed in sections 2.3.3, 2.4.3, 2.5.3, and 2.6.3.

3 APPENDIX

Citizenship
Types.xlsx

CalSAWS

California Statewide Automated Welfare System

Design

CA-284414

Update Dashboard to include the Counties opting into the GA/GR Automated Solution

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Susanna Martinez	
	Reviewed By	Gokul Suresh, Esequiel Herrera-Ortiz	
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
3/26/2025	1	Initial Document	Susanna Martinez
4/24/2025	2	Updated Assumption # 3	Susanna Martinez

Table of Contents

CA-284414 – Update Dashboard to include the Counties opting into the GA/GR Automated Solution

1 OVERVIEW

Select General Relief business intelligence dashboards do not include data on the GA/GR Automated Solution or General Assistance (Managed) programs. These dashboards will be updated to include data on the GA/GR Automated Solution and General Assistance (Managed) programs for those counties that are opted into these programs.

1.1 Current Design

Select General Relief dashboards do not include data for the counties opted into the GA/GR Automated Solution or General Assistance (Managed) programs.

1.2 Requests

Update select General Relief dashboards to include data for the GA/GR Automated Solution and General Assistance (Managed) programs.

1.3 Overview of Recommendations

1. Update the following General Relief dashboards to include the GA/GR Automated Solution and General Assistance (Managed) programs:
   a. DPSSSTATS – Disability Assessment – General Relief
   b. DPSSSTATS – GR Aided Caseload – General Relief
   c. DPSSSTATS – GR Sanctions by Category – General Relief
   d. DPSSSTATS – Newly Approved Aided Person – General Relief
   e. DPSSSTATS – Renewals – General Relief

1.4 Assumptions

1. Those counties currently opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be impacted by these updates.
2. The GA/GR Automated Solution program will be implemented for San Bernardino County via SCR CA-284964.
3. The logic for these dashboards does not restrict the program data by the county code of the related case. In other words, if a county is opted-into their expected General Relief program but there exists data for a different General Relief program, that data is subject to appear in the dashboard. A county is only subject to seeing its own county's data. That functionality is not changing. However, since we are introducing various General Relief programs now into

the dashboard, the dashboard is not restricting the data by a particular General Relief program code dependent on the county code. For example, if County A is typically opted into the General Assistance (Managed) program, we are not restricting the data to only the General Assistance (Managed) program for that county. If there exists for example, GA/GR Automated Solution data for that county because they chose to later opt into that solution then that would be subject to appear in the dashboard.

4. SCR CA-284413 will address remaining reports and dashboards that need GA/GR program information added.

2 RECOMMENDATIONS

The following General Relief dashboards will be updated to include the GA/GR Automated Solution and General Assistance (Managed) program:

- DPSSSTATS – Disability Assessment – General Relief
- DPSSSTATS – GR Aided Caseload – General Relief
- DPSSSTATS – GR Sanctions by Category – General Relief
- DPSSSTATS – Newly Approved Aided Person – General Relief
- DPSSSTATS – Renewals – General Relief

2.1 Disability Assessment

2.1.1 Overview

The Disability Assessment dashboard provides data on individual's disability assessments for the General Relief program. This dashboard is refreshed daily.

This SCR will expand the program data populated on this dashboard to include the GA/GR Automated Solution and General Assistance (Managed) program. The dashboard is already running for the General Assistance/General Relief program.

Navigation: Reports-> Business Intelligence-> DPSSSTATS-> Disability Assessment - General Relief

2.1.2 Disability Assessment Mockup

Figure 2.1.2.1 – Disability Assessment Dashboard

Note: No cosmetic changes are required for this dashboard. This mockup has been cropped to fit the page. The full mockup can be found in the Supporting Documents section.

2.1.3 Description of Change

1. Update the 'Disability Assessment' dashboard logic to include the GA/GR Automated Solution and General Assistance (Managed) programs.

CATEGORY ID	CODE VALUE	SHORT DECODE VALUE
18	GR	GA/GR Automated Solution
18	GM	General Assistance (Managed)

2. The logic update will expand the program data populated on all dashboard reports within the 'Disability Assessment' dashboard.

2.1.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: DPSSSTATS**

2.1.5 Counties Impacted

Those counties opted in to the GA/GR Automated Solution or General Assistance (Managed) program will be impacted by this change.

2.1.6 Security Updates

1. Security Rights

Note: No changes to the following security right or group to right mapping are required. The existing security right and groups mapped to that right will be listed as strictly informational, so users know which group their role needs to be mapped to for access to the dashboard.

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
GeneralRelief DisabilityAssessments	Provides access to the Disability Assessment – General Relief dashboard	• BI Administrator • BI Author • BI Consumer • BI Super User

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A	N/A	N/A

2.1.7 Report Usage/Performance

The dashboard usage is expected to increase as the counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be able to utilize the report. No significant change in performance is expected.

2.2 GR Aided Caseload

2.2.1 Overview

The GR Aided Caseload dashboard provides data on aided cases for the General Relief program. This dashboard is refreshed monthly.

This SCR will expand the program data populated on this dashboard to include the GA/GR Automated Solution and General Assistance (Managed) programs. The dashboard is already running for the General Assistance/General Relief program.

Navigation: Reports-> Business Intelligence-> DPSSSTATS-> GR Aided Caseload - General Relief

2.2.2 GR Aided Caseload Mockup

Figure 2.2.2.1 – GR Aided Caseload Dashboard
Note: No cosmetic changes are required for this dashboard. This mockup has been cropped to fit the page. The full mockup can be found in the Supporting Documents section.

2.2.3 Description of Change

1. Update the 'GR Aided Caseload' (General Relief Aided Cases) dashboard logic to include the GA/GR Automated Solution and General Assistance (Managed) programs.

CATEGORY ID	CODE VALUE	SHORT DECODE VALUE
18	GR	GA/GR Automated Solution
18	GM	General Assistance (Managed)

2. The logic update will expand the program data populated on all dashboard reports within the 'GR Aided Caseload' dashboard.

2.2.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: DPSSSTATS**

2.2.5 Counties Impacted

Those counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be impacted by this change.

2.2.6 Security Updates

1. Security Rights

Note: No changes to the following security right or group to right mapping are required. The existing security right and groups mapped to that right will be listed as strictly informational, so users know which group their role needs to be mapped to for access to the dashboard.

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
GeneralReliefGRAided Caseload	Provides access to the GR Aided Caseload dashboard	• BI Administrator • BI Author • BI Consumer • BI Super User

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A	N/A	N/A

2.2.7 Report Usage/Performance

The dashboard usage is expected to increase as the counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be able to utilize the report. No significant change in performance is expected.

2.3 GR Sanctions by Category

2.3.1 Overview

The GR Sanctions by Category dashboard provides data on sanctions for the General Relief program. This dashboard is refreshed monthly.

This SCR will expand the program data populated on this dashboard to include the GA/GR Automated Solution and General Assistance (Managed) program. The dashboard is already running for the General Assistance/General Relief program.

Navigation: Reports-> Business Intelligence-> DPSSSTATS-> GR Sanctions by Category - General Relief
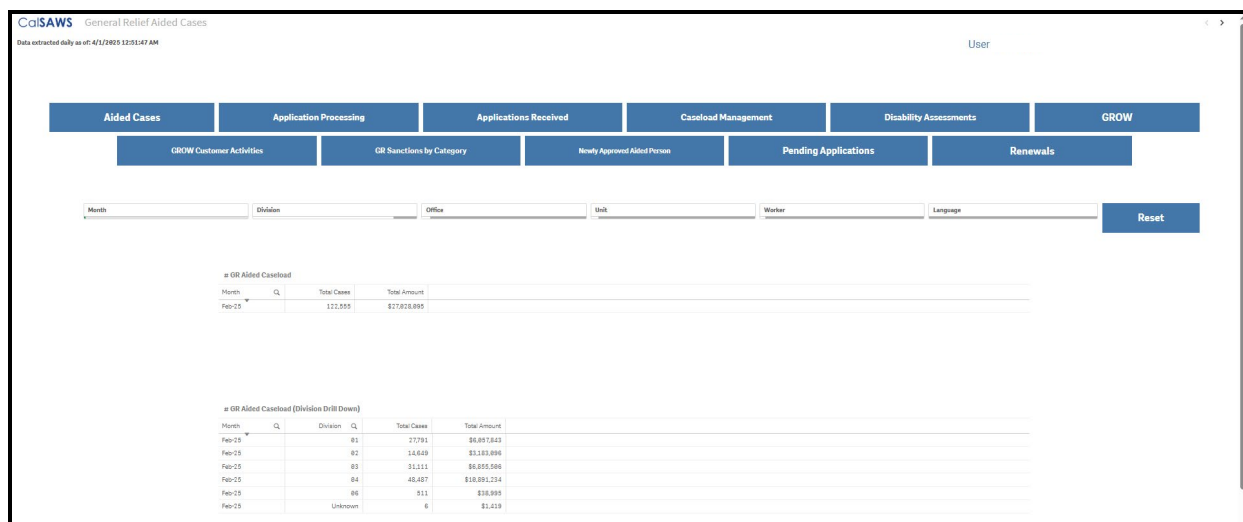
2.3.2 GR Sanctions by Category Mockup
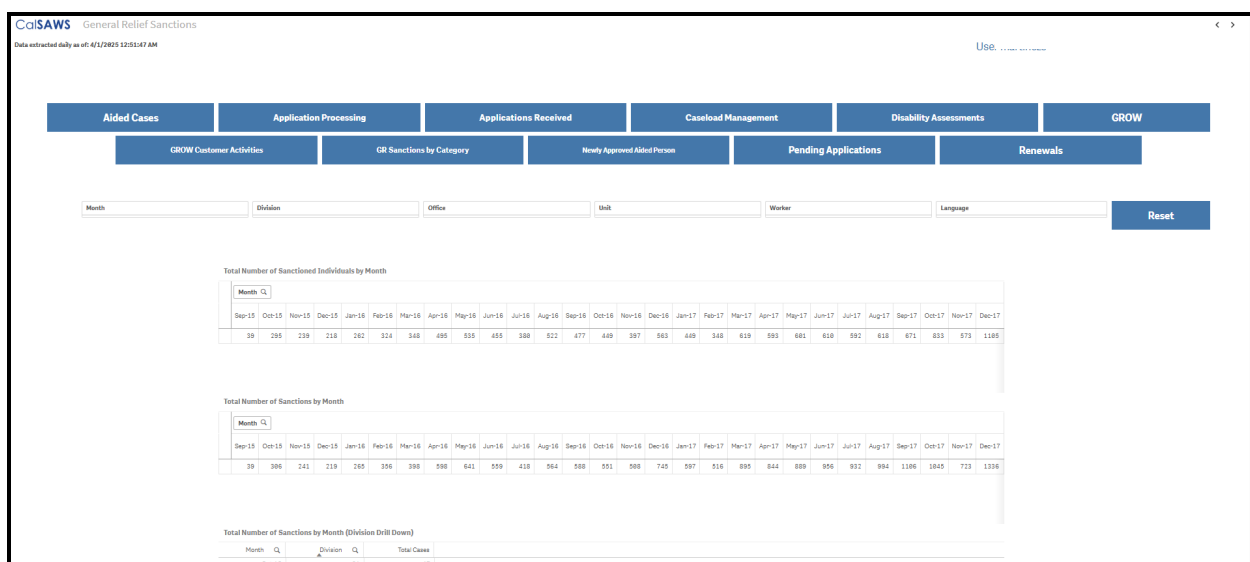
Figure 2.3.2.1 – GR Sanctions by Category Dashboard
Note: No cosmetic changes are required for this dashboard. This mockup has been cropped to fit the page. The full mockup can be found in the Supporting Documents section.

2.3.3   Description of Change

1. Update the 'GR Sanctions by Category (General Relief Sanctions) dashboard logic to include the GA/GR Automated Solution and General Assistance (Managed) programs.

CATEGORY ID	CODE VALUE	SHORT DECODE VALUE
18	GR	GA/GR Automated Solution
18	GM	General Assistance (Managed)

2. The logic update will expand the program data populated on all dashboard reports within the 'GR Sanctions by Category' dashboard.

2.3.4   Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: DPSSSTATS**

2.3.5   Counties Impacted

Those counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be impacted by this change.

2.3.6   Security Updates

1. Security Rights

   Note: No changes to the following security right or group to right mapping are required. The existing security right and groups mapped to that right will be listed as strictly informational, so users know which group their role needs to be mapped to for access to the dashboard.

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
GeneralReliefGRSanctionsbyCategory	Provides access to the GR Sanctions by Category dashboard	• BI Administrator • BI Author • BI Consumer • BI Super User

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A	N/A	N/A

2.3.7 Report Usage/Performance

The dashboard usage is expected to increase as the counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be able to utilize the report. No significant change in performance is expected.

2.4 Newly Approved Aided Person - General Relief

2.4.1 Overview

The Newly Approved Aided Person – General Relief dashboard provides data on newly approved aided persons under the General Relief program. This dashboard is refreshed daily.

This SCR will expand the program data populated on this dashboard to include the GA/GR Automated Solution and General Assistance (Managed) programs. The dashboard is already running for the General Assistance/General Relief program.

Navigation: Reports-> Business Intelligence-> DPSSSTATS-> Newly Approved Aided Person - General Relief

2.4.2 Newly Approved Aided Person – General Relief Mockup

Figure 2.4.2.1 – Newly Approved Aided Person – General Relief Dashboard

Note: No cosmetic changes are required for this dashboard. This mockup has been cropped to fit the page. The full mockup can be found in the Supporting Documents section.

2.4.3 Description of Change

1. Update the 'Newly Approved Aided Person (General Relief Newly Approved Aided Person) dashboard logic to include the GA/GR Automated Solution and General Assistance (Managed) programs.

CATEGORY ID	CODE VALUE	SHORT DECODE VALUE
18	GR	GA/GR Automated Solution
18	GM	General Assistance (Managed)

2. The logic update will expand the program data populated on all dashboard reports within the 'Newly Approved Aided Person' dashboard.

2.4.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: DPSSSTATS**

2.4.5 Counties Impacted

Those counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be impacted by this change.

2.4.6 Security Updates

1. Security Rights

Note: No changes to the following security right or group to right mapping are required. The existing security right and groups mapped to that right will be listed as strictly informational, so users know which group their role needs to be mapped to for access to the dashboard.

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
GeneralReliefNewlyApprovedAidedPerson	Provides access to the Newly Approved Aided Person – General Relief dashboard	• BI Administrator • BI Author • BI Consumer • BI Super User

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A	N/A	N/A

2.4.7 Report Usage/Performance

The dashboard usage is expected to increase as the counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be able to utilize the report. No significant change in performance is expected.

2.5 Renewals- General Relief

2.5.1 Overview

The Renewals – General Relief dashboard provides data on renewals for the General Relief program. This dashboard is refreshed daily.

This SCR will expand the program data populated on this dashboard to include the GA/GR Automated Solution and General Assistance (Managed) programs. The dashboard is already running for the General Assistance/General Relief program.

Navigation: Reports-> Business Intelligence-> DPSSSTATS-> Newly Approved Aided Person - General Relief

2.5.2 Renewals – General Relief Mockup
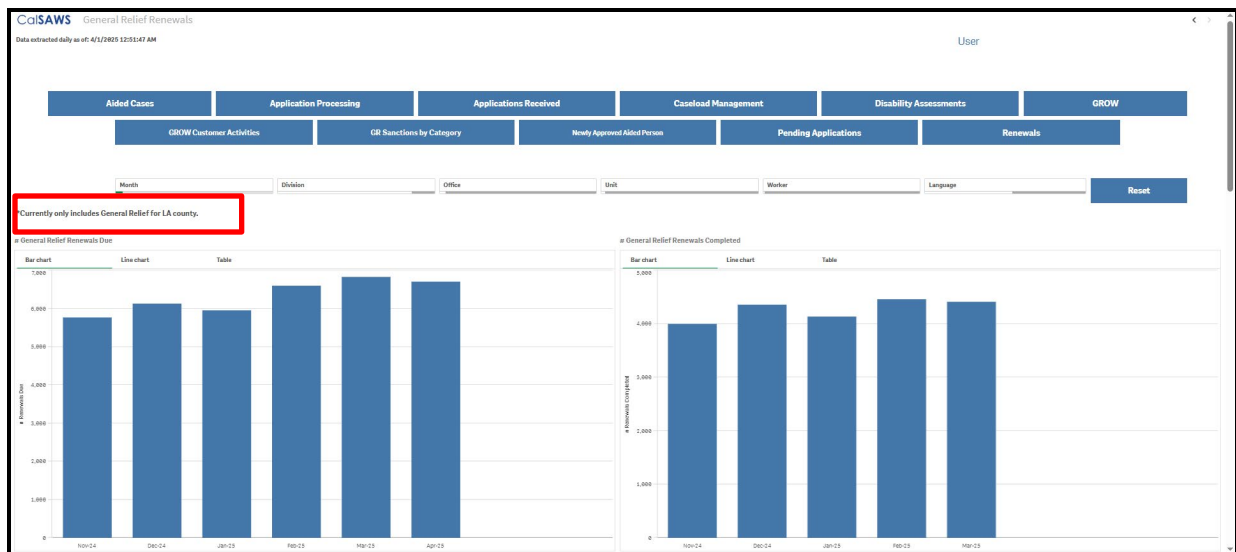
Figure 2.5.2.1 – Renewals – General Relief Dashboard before removal of note
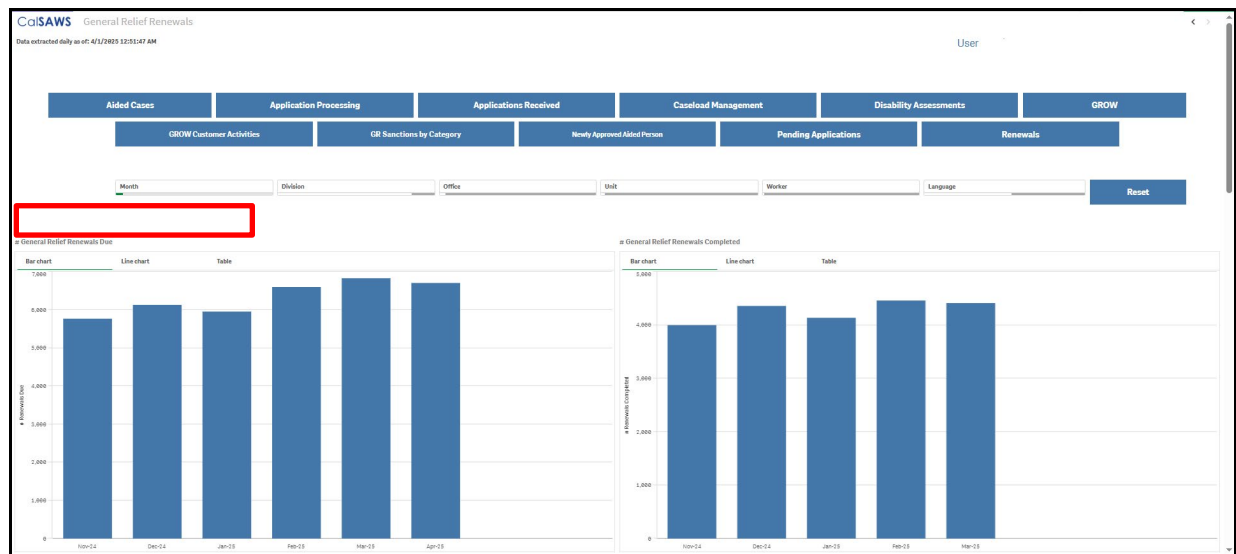
Figure 2.5.2.2 – Renewals – General Relief Dashboard after removal of note

Note: This mockup has been cropped to fit the page. The full mockup can be found in the Supporting Documents section.

2.5.3 Description of Change

1. Update the 'Renewals' (General Relief Renewals) dashboard logic to include the GA/GR Automated Solution and General Assistance (Managed) programs.

CATEGORY ID	CODE VALUE	SHORT DECODE VALUE
18	GR	GA/GR Automated Solution
18	GM	General Assistance (Managed)

2. The logic update will expand the program data populated on all dashboard reports within the 'Renewals' dashboard.
3. Remove the note "*Currently only includes General Relief for LA county." from displaying on the dashboard page.

2.5.4 Report Location

- **Global: Reports**
- **Local: Business Intelligence**
- **Task: DPSSSTATS**

2.5.5 Counties Impacted

Those counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be impacted by this change.

2.5.6 Security Updates

1. Security Rights

   Note: No changes to the following security right or group to right mapping are required. The existing security right and groups mapped to that right will be listed as strictly informational, so users know which group their role needs to be mapped to for access to the dashboard.

SECURITY RIGHT	RIGHT DESCRIPTION	RIGHT TO GROUP MAPPING
GeneralReliefGRAided Caseload	Provides access to the Renewals – General Relief dashboard	• BI Administrator • BI Author • BI Consumer • BI Super User

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A	N/A	N/A

2.5.7 Report Usage/Performance

The dashboard usage is expected to increase as the counties opted in to the GA/GR Automated Solution or General Assistance (Managed) programs will be able to utilize the report. No significant change in performance is expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Business Intelligence	Disability Assessments – General Relief Dashboard Mockup	Disability Assessments - Genera
2	Business Intelligence	GR Aided Caseload Dashboard Mockup	GR Aided Caseload Dashboard Mockup.dc
3	Business Intelligence	GR Sanctions Category Dashboard Mockup	GR Sanctions by Category Dashboard I
4	Business Intelligence	Newly Approved Aided Person – General Relief Dashboard Mockup	Newly Approved Aided Person - Genera
5	Business Intelligence	Renewals – General Relief Dashboard Mockup	Renewals - General Relief Dashboard Moc

4 APPENDIX

N/A

CalSAWS

California Statewide Automated Welfare System

Design

DOCUMENT APPROVAL HISTORY			
Prepared By	Kalidindi Sree		
Reviewed By			
DATE	**VERSION**	**REVISION DESCRIPTION**	**AUTHOR**
12/16/2024	1.0	Initial Draft	Kalidindi Sree

CalSAWS

Table of Contents

CA-228414 Add 2026-2028 to the ABAWD Time Limit Calendar

1 OVERVIEW

The Able-Bodied Adults Without Dependents (ABAWD) time limit is a federal rule that limits California residents to three months of CalFresh benefits every three years.

1.1 Current Design

California has implemented a fixed ABAWD statewide clock, whereby the 36-month period has the same beginning and end date in all 58 counties for all ABAWDs.

SCR CA-57971 added values in the ABAWD Time Limit Period Code Table (CT 2621) through 12/31/2022.

SCR CA-252931 extended the ABAWD time limits through 12/31/2025.

1.2 Requests

Add January 1, 2026 - December 31, 2028, to the ABAWD Time Limit Calendar.

1.3 Overview of Recommendations

1. Add a new 3-year ABAWD period from 2026-2028 to CT 2621 (ABAWD Time Limit Period).

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Eligibility: Add ABAWD Time Period

2.1.1 Overview

Add a new ABAWD time period to CT 2621.

2.1.2 Description of Changes

1. Set the end date to 12/31/2025 on the existing record in CT 2621 for the period '01/2023 -12/2025'.
2. Add a new record to CT 2621 as shown below:

COLUMN	VALUE
CODE_NUM_IDENTIF	01
CATGRY_ID	2621
SHORT_DECODE_NAME	01/2026
LONG_DECODE_NAME	01/2026 - 12/2028
ORDR_BY_NUM	0
BEG_DATE	01/01/2026
END_DATE	12/31/9999
REFER_TABLE_1_DESCR (Begin Date)	01/01/2026
REFER_TABLE_2_DESCR (End Date)	12/31/2028

2.1.3 Programs Impacted

CalFresh

2.1.4 Performance Impacts

None.

Design

CalSAWS

DOCUMENT APPROVAL HISTORY			
Prepared By	Henry Thamas		
Reviewed By			

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/17/2025	1.0	Initial Draft	Henry Thamas
03/25/2025	2.0	Review changes	Henry Thamas

Table of Contents

CA-288029 – Solano GA - Annual In-Kind Income and Property Limit Increases

1 OVERVIEW

This SCR will be updating the In-kind income amount and countable resource limits for Solano County effective 07/01/2025

1.1 Current Design

CalSAWS is currently using Solano County values that will be increasing as of 07/01/2024.

1.2 Requests

1. Solano County is updating their In-kind Income values for GA/GR Automated Solution program effective 07/01/2025 and have requested CalSAWS to update the In-Kind income amount values for the following types:
   - Housing-Earned
   - Utilities-Earned
   - Clothing-Earned
   - Food-Earned
   - Housing-Unearned
   - Utilities-Unearned
   - Clothing-Unearned
   - Food-Unearned
2. Solano County is updating their resource limits values for GA/GR Automated Solution program effective 07/01/2025 and have requested CalSAWS to update the resource limits values for the following types:
   - Real Property Limit
   - Vehicle Property Limit
   - Liquid Asset
   - Personal Property Limit

1.3 Overview of Recommendations

1. Code Table Change Request (CTCR) to update existing individual In-Kind income amounts and add new individual In-Kind amounts for Solano County.
2. Code Table Change Request (CTCR) to update existing individual resource limits values and add new individual resource limits values for Solano County.

1.4 Assumptions

1. County users will run Online EDBC to apply new values.
2. In-kind income under Admin County Rules > Income will have 'In-kind Income applicable' set to 'Yes' for Solano County effective 07/2025

2 RECOMMENDATIONS

2.1 In-Kind Income Update

2.1.1 Overview

Apply CTCR to end date existing GA/GR In-Kind Income Amounts (Code Table 10688) and add new GA/GR In-Kind Income Amounts for Solano County.

2.1.2 Description of Changes

1. Set the End Date to **06/30/2025** on the following existing individual In-Kind Income records for Solano County:

Catgry ID	Code_Num_Identif	Decode Name	Begin Date	End Date	County Code	Household Size	Income Type	Region	In-kind Chart Amount
10688	U5	Clothing - Earned	7/1/2024	12/31/9999	48	1	95	R1	64
10688	UG	Clothing - Earned	7/1/2024	12/31/9999	48	2	95	R1	130
10688	UO	Clothing - Earned	7/1/2024	12/31/9999	48	3	95	R1	192
10688	UW	Clothing - Earned	7/1/2024	12/31/9999	48	4	95	R1	255
10688	TE	Clothing - Earned	7/1/2024	12/31/9999	48	5	95	R1	325
10688	TM	Clothing - Earned	7/1/2024	12/31/9999	48	6	95	R1	391
10688	TU	Clothing - Earned	7/1/2024	12/31/9999	48	7	95	R1	457
10688	S5	Clothing - Earned	7/1/2024	12/31/9999	48	8	95	R1	508
10688	SG	Clothing - Earned	7/1/2024	12/31/9999	48	9	95	R1	584
10688	SO	Clothing - Earned	7/1/2024	12/31/9999	48	10	95	R1	636
10688	U6	Clothing – Unearned	7/1/2024	12/31/9999	48	1	94	R1	64
10688	UH	Clothing – Unearned	7/1/2024	12/31/9999	48	2	94	R1	130
10688	UP	Clothing – Unearned	7/1/2024	12/31/9999	48	3	94	R1	192
10688	UX	Clothing – Unearned	7/1/2024	12/31/9999	48	4	94	R1	255
10688	TF	Clothing – Unearned	7/1/2024	12/31/9999	48	5	94	R1	325

10688	TN	Clothing – Unearned	7/1/2024	**12/31/9999**	48	6	94	R1	391
10688	TV	Clothing – Unearned	7/1/2024	**12/31/9999**	48	7	94	R1	457
10688	S6	Clothing – Unearned	7/1/2024	**12/31/9999**	48	8	94	R1	508
10688	SH	Clothing – Unearned	7/1/2024	**12/31/9999**	48	9	94	R1	584
10688	SP	Clothing – Unearned	7/1/2024	**12/31/9999**	48	10	94	R1	636
10688	VW	Food - Earned	7/1/2024	**12/31/9999**	48	1	93	R1	217
10688	UA	Food - Earned	7/1/2024	**12/31/9999**	48	2	93	R1	465
10688	UI	Food - Earned	7/1/2024	**12/31/9999**	48	3	93	R1	598
10688	UQ	Food - Earned	7/1/2024	**12/31/9999**	48	4	93	R1	740
10688	UY	Food - Earned	7/1/2024	**12/31/9999**	48	5	93	R1	898
10688	TG	Food - Earned	7/1/2024	**12/31/9999**	48	6	93	R1	1038
10688	TO	Food - Earned	7/1/2024	**12/31/9999**	48	7	93	R1	1156
10688	TW	Food - Earned	7/1/2024	**12/31/9999**	48	8	93	R1	1263
10688	SA	Food - Earned	7/1/2024	**12/31/9999**	48	9	93	R1	1388
10688	SI	Food - Earned	7/1/2024	**12/31/9999**	48	10	93	R1	1502
10688	VX	Food - Unearned	7/1/2024	**12/31/9999**	48	1	92	R1	217
10688	UB	Food - Unearned	7/1/2024	**12/31/9999**	48	2	92	R1	465
10688	UJ	Food - Unearned	7/1/2024	**12/31/9999**	48	3	92	R1	598
10688	UR	Food - Unearned	7/1/2024	**12/31/9999**	48	4	92	R1	740
10688	UZ	Food - Unearned	7/1/2024	**12/31/9999**	48	5	92	R1	898
10688	TH	Food - Unearned	7/1/2024	**12/31/9999**	48	6	92	R1	1038
10688	TP	Food - Unearned	7/1/2024	**12/31/9999**	48	7	92	R1	1156
10688	TX	Food - Unearned	7/1/2024	**12/31/9999**	48	8	92	R1	1263
10688	SB	Food - Unearned	7/1/2024	**12/31/9999**	48	9	92	R1	1388
10688	SJ	Food - Unearned	7/1/2024	**12/31/9999**	48	10	92	R1	1502
10688	VY	Housing - Earned	7/1/2024	**12/31/9999**	48	1	97	R1	398
10688	UC	Housing - Earned	7/1/2024	**12/31/9999**	48	2	97	R1	530
10688	UK	Housing - Earned	7/1/2024	**12/31/9999**	48	3	97	R1	580
10688	US	Housing - Earned	7/1/2024	**12/31/9999**	48	4	97	R1	610
10688	TA	Housing - Earned	7/1/2024	**12/31/9999**	48	5	97	R1	610
10688	TI	Housing - Earned	7/1/2024	**12/31/9999**	48	6	97	R1	610
10688	TQ	Housing - Earned	7/1/2024	**12/31/9999**	48	7	97	R1	610
10688	TY	Housing - Earned	7/1/2024	**12/31/9999**	48	8	97	R1	610

10688	SC	Housing - Earned	7/1/2024	**12/31/9999**	48	9	97	R1	610
10688	SK	Housing - Earned	7/1/2024	**12/31/9999**	48	10	97	R1	610
10688	VZ	Housing - Unearned	7/1/2024	**12/31/9999**	48	1	96	R1	398
10688	UD	Housing - Unearned	7/1/2024	**12/31/9999**	48	2	96	R1	530
10688	UL	Housing - Unearned	7/1/2024	**12/31/9999**	48	3	96	R1	580
10688	UT	Housing - Unearned	7/1/2024	**12/31/9999**	48	4	96	R1	610
10688	TB	Housing - Unearned	7/1/2024	**12/31/9999**	48	5	96	R1	610
10688	TJ	Housing - Unearned	7/1/2024	**12/31/9999**	48	6	96	R1	610
10688	TR	Housing - Unearned	7/1/2024	**12/31/9999**	48	7	96	R1	610
10688	TZ	Housing - Unearned	7/1/2024	**12/31/9999**	48	8	96	R1	610
10688	SD	Housing - Unearned	7/1/2024	**12/31/9999**	48	9	96	R1	610
10688	SL	Housing - Unearned	7/1/2024	**12/31/9999**	48	10	96	R1	610
10688	U3	Utilities – Earned	7/1/2024	**12/31/9999**	48	1	37	R1	82
10688	UE	Utilities – Earned	7/1/2024	**12/31/9999**	48	2	37	R1	94
10688	UM	Utilities – Earned	7/1/2024	**12/31/9999**	48	3	37	R1	98
10688	UU	Utilities – Earned	7/1/2024	**12/31/9999**	48	4	37	R1	102
10688	TC	Utilities – Earned	7/1/2024	**12/31/9999**	48	5	37	R1	102
10688	TK	Utilities – Earned	7/1/2024	**12/31/9999**	48	6	37	R1	102
10688	TS	Utilities – Earned	7/1/2024	**12/31/9999**	48	7	37	R1	102
10688	S1	Utilities – Earned	7/1/2024	**12/31/9999**	48	8	37	R1	102
10688	SE	Utilities – Earned	7/1/2024	**12/31/9999**	48	9	37	R1	102
10688	SM	Utilities – Earned	7/1/2024	**12/31/9999**	48	10	37	R1	102
10688	U4	Utilities – Unearned	7/1/2024	**12/31/9999**	48	1	36	R1	82
10688	UF	Utilities – Unearned	7/1/2024	**12/31/9999**	48	2	36	R1	94
10688	UN	Utilities – Unearned	7/1/2024	**12/31/9999**	48	3	36	R1	98
10688	UV	Utilities – Unearned	7/1/2024	**12/31/9999**	48	4	36	R1	102
10688	TD	Utilities – Unearned	7/1/2024	**12/31/9999**	48	5	36	R1	102
10688	TL	Utilities – Unearned	7/1/2024	**12/31/9999**	48	6	36	R1	102
10688	TT	Utilities – Unearned	7/1/2024	**12/31/9999**	48	7	36	R1	102
10688	S4	Utilities – Unearned	7/1/2024	**12/31/9999**	48	8	36	R1	102
10688	SF	Utilities – Unearned	7/1/2024	**12/31/9999**	48	9	36	R1	102
10688	SN	Utilities – Unearned	7/1/2024	**12/31/9999**	48	10	36	R1	102

2. Add the following individual In-Kind records for Solano County effective as of **07/01/2025**:

CATGRY ID	Code_ Num_ Identif	Decode Name	Begin Date	End Date	County Code	Household Size	Income Type	Region	In-kind Chart Amount
10688	U5	Clothing - Earned	7/1/2025	12/31/9999	48	1	95	R1	65
10688	UG	Clothing - Earned	7/1/2025	12/31/9999	48	2	95	R1	133
10688	UO	Clothing - Earned	7/1/2025	12/31/9999	48	3	95	R1	197
10688	UW	Clothing - Earned	7/1/2025	12/31/9999	48	4	95	R1	262
10688	TE	Clothing - Earned	7/1/2025	12/31/9999	48	5	95	R1	334
10688	TM	Clothing - Earned	7/1/2025	12/31/9999	48	6	95	R1	402
10688	TU	Clothing - Earned	7/1/2025	12/31/9999	48	7	95	R1	470
10688	S5	Clothing - Earned	7/1/2025	12/31/9999	48	8	95	R1	523
10688	SG	Clothing - Earned	7/1/2025	12/31/9999	48	9	95	R1	601
10688	SO	Clothing - Earned	7/1/2025	12/31/9999	48	10	95	R1	655
10688	U6	Clothing – Unearned	7/1/2025	12/31/9999	48	1	94	R1	65
10688	UH	Clothing – Unearned	7/1/2025	12/31/9999	48	2	94	R1	133
10688	UP	Clothing – Unearned	7/1/2025	12/31/9999	48	3	94	R1	197
10688	UX	Clothing – Unearned	7/1/2025	12/31/9999	48	4	94	R1	262
10688	TF	Clothing – Unearned	7/1/2025	12/31/9999	48	5	94	R1	334
10688	TN	Clothing – Unearned	7/1/2025	12/31/9999	48	6	94	R1	402
10688	TV	Clothing – Unearned	7/1/2025	12/31/9999	48	7	94	R1	470
10688	S6	Clothing – Unearned	7/1/2025	12/31/9999	48	8	94	R1	523
10688	SH	Clothing – Unearned	7/1/2025	12/31/9999	48	9	94	R1	601
10688	SP	Clothing – Unearned	7/1/2025	12/31/9999	48	10	94	R1	655
10688	VW	Food - Earned	7/1/2025	12/31/9999	48	1	93	R1	223
10688	UA	Food - Earned	7/1/2025	12/31/9999	48	2	93	R1	478
10688	UI	Food - Earned	7/1/2025	12/31/9999	48	3	93	R1	615
10688	UQ	Food - Earned	7/1/2025	12/31/9999	48	4	93	R1	762
10688	UY	Food - Earned	7/1/2025	12/31/9999	48	5	93	R1	924
10688	TG	Food - Earned	7/1/2025	12/31/9999	48	6	93	R1	1069
10688	TO	Food - Earned	7/1/2025	12/31/9999	48	7	93	R1	1190
10688	TW	Food - Earned	7/1/2025	12/31/9999	48	8	93	R1	1300

10688	SA	Food - Earned	7/1/2025	12/31/9999	48	9	93	R1	1429
10688	SI	Food - Earned	7/1/2025	12/31/9999	48	10	93	R1	1547
10688	VX	Food - Unearned	7/1/2025	12/31/9999	48	1	92	R1	223
10688	UB	Food - Unearned	7/1/2025	12/31/9999	48	2	92	R1	478
10688	UJ	Food - Unearned	7/1/2025	12/31/9999	48	3	92	R1	615
10688	UR	Food - Unearned	7/1/2025	12/31/9999	48	4	92	R1	762
10688	UZ	Food - Unearned	7/1/2025	12/31/9999	48	5	92	R1	924
10688	TH	Food - Unearned	7/1/2025	12/31/9999	48	6	92	R1	1069
10688	TP	Food - Unearned	7/1/2025	12/31/9999	48	7	92	R1	1190
10688	TX	Food - Unearned	7/1/2025	12/31/9999	48	8	92	R1	1300
10688	SB	Food - Unearned	7/1/2025	12/31/9999	48	9	92	R1	1429
10688	SJ	Food - Unearned	7/1/2025	12/31/9999	48	10	92	R1	1547
10688	VY	Housing - Earned	7/1/2025	12/31/9999	48	1	97	R1	409
10688	UC	Housing - Earned	7/1/2025	12/31/9999	48	2	97	R1	545
10688	UK	Housing - Earned	7/1/2025	12/31/9999	48	3	97	R1	597
10688	US	Housing - Earned	7/1/2025	12/31/9999	48	4	97	R1	628
10688	TA	Housing - Earned	7/1/2025	12/31/9999	48	5	97	R1	628
10688	TI	Housing - Earned	7/1/2025	12/31/9999	48	6	97	R1	628
10688	TQ	Housing - Earned	7/1/2025	12/31/9999	48	7	97	R1	628
10688	TY	Housing - Earned	7/1/2025	12/31/9999	48	8	97	R1	628
10688	SC	Housing - Earned	7/1/2025	12/31/9999	48	9	97	R1	628
10688	SK	Housing - Earned	7/1/2025	12/31/9999	48	10	97	R1	628
10688	VZ	Housing - Unearned	7/1/2025	12/31/9999	48	1	96	R1	409
10688	UD	Housing - Unearned	7/1/2025	12/31/9999	48	2	96	R1	545
10688	UL	Housing - Unearned	7/1/2025	12/31/9999	48	3	96	R1	597
10688	UT	Housing - Unearned	7/1/2025	12/31/9999	48	4	96	R1	628
10688	TB	Housing - Unearned	7/1/2025	12/31/9999	48	5	96	R1	628
10688	TJ	Housing - Unearned	7/1/2025	12/31/9999	48	6	96	R1	628
10688	TR	Housing - Unearned	7/1/2025	12/31/9999	48	7	96	R1	628
10688	TZ	Housing - Unearned	7/1/2025	12/31/9999	48	8	96	R1	628
10688	SD	Housing - Unearned	7/1/2025	12/31/9999	48	9	96	R1	628
10688	SL	Housing - Unearned	7/1/2025	12/31/9999	48	10	96	R1	628
10688	U3	Utilities – Earned	7/1/2025	12/31/9999	48	1	37	R1	84

10688	UE	Utilities – Earned	**7/1/2025**	12/31/9999	48	2	37	R1	**96**
10688	UM	Utilities – Earned	**7/1/2025**	12/31/9999	48	3	37	R1	**100**
10688	UU	Utilities – Earned	**7/1/2025**	12/31/9999	48	4	37	R1	**105**
10688	TC	Utilities – Earned	**7/1/2025**	12/31/9999	48	5	37	R1	**105**
10688	TK	Utilities – Earned	**7/1/2025**	12/31/9999	48	6	37	R1	**105**
10688	TS	Utilities – Earned	**7/1/2025**	12/31/9999	48	7	37	R1	**105**
10688	S1	Utilities – Earned	**7/1/2025**	12/31/9999	48	8	37	R1	**105**
10688	SE	Utilities – Earned	**7/1/2025**	12/31/9999	48	9	37	R1	**105**
10688	SM	Utilities – Earned	**7/1/2025**	12/31/9999	48	10	37	R1	**105**
10688	U4	Utilities – Unearned	**7/1/2025**	12/31/9999	48	1	36	R1	**84**
10688	UF	Utilities – Unearned	**7/1/2025**	12/31/9999	48	2	36	R1	**96**
10688	UN	Utilities – Unearned	**7/1/2025**	12/31/9999	48	3	36	R1	**100**
10688	UV	Utilities – Unearned	**7/1/2025**	12/31/9999	48	4	36	R1	**105**
10688	TD	Utilities – Unearned	**7/1/2025**	12/31/9999	48	5	36	R1	**105**
10688	TL	Utilities – Unearned	**7/1/2025**	12/31/9999	48	6	36	R1	**105**
10688	TT	Utilities – Unearned	**7/1/2025**	12/31/9999	48	7	36	R1	**105**
10688	S4	Utilities – Unearned	**7/1/2025**	12/31/9999	48	8	36	R1	**105**
10688	SF	Utilities – Unearned	**7/1/2025**	12/31/9999	48	9	36	R1	**105**
10688	SN	Utilities – Unearned	**7/1/2025**	12/31/9999	48	10	36	R1	**105**

Technical Note:
Code Table 10688 Reference Table Columns:
- REFER_TABLE_1_DESCR = County Code
- REFER_TABLE_2_DESCR = Household Size
- REFER_TABLE_3_DESCR = Income Type (values in Short/Long Decode Name columns from CT 186)
  - 36 - Utilities - Unearned
  - 37 - Utilities - Earned
  - 92 - Food - Unearned
  - 93 - Food - Earned
  - 94 - Clothing - Unearned
  - 95 - Clothing - Earned
  - 96 - Housing - Unearned
  - 97 - Housing - Earned
- REFER_TABLE_4_DESCR = Region
- REFER_TABLE_5_DESCR = In-kind Chart Amount
  (There are other reference columns in this table, but they are null/not used by any of the above counties:
  6-Other, 7-Stabilization, 8-SSIP/CALM/PAES/AGEX, 9-GA/GR)

2.1.3 Programs Impacted

GA/GR Automated Solution

2.2 Property and Resource Limit Updates

2.2.1 Overview

Apply CTCR to end date existing GA/GR resource limits values (Code Table 10664) and add new GA/GR resource limits values for Solano County.

2.2.2 Description of Changes

1. Set the End Date to **06/30/2025** on the following resource amount records in the CT10664 (GA GR Resource Limit) table for Solano County:

CATGRY ID	Code Num Identif	Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GAGR Resource Limit Category
10664	N4	Liquid Asset	9/1/2023	12/31/9999	48	1	429	LA
10664	BQ	Liquid Asset	9/1/2023	12/31/9999	48	2	697	LA
10664	Y1	Personal Property Limit	9/1/2023	12/31/9999	48	1	429	PP
10664	BP	Personal Property Limit	9/1/2023	12/31/9999	48	2	697	PP
10664	1C	Real Property Limit	9/1/2023	12/31/9999	48	1	429	RP
10664	BO	Real Property Limit	9/1/2023	12/31/9999	48	2	697	RP
10664	7O	Vehicle Property Limit	9/1/2023	12/31/9999	48	1	0	VP
10664	BR	Vehicle Property Limit	9/1/2023	12/31/9999	48	2	0	VP

2. Insert new resource amount records in CT10664 (GA GR Resource Limit) table for Solano County effective as of **07/01/2025** as shown below:

CATGRY ID	Code Num Identif	Decode Name	Begin Date	End Date	County Code	Household Size	Resource Limit	GAGR Resource Limit Category
10664	N4	Liquid Asset	7/1/2025	12/31/9999	48	1	441	LA
10664	BQ	Liquid Asset	7/1/2025	12/31/9999	48	2	717	LA
10664	Y1	Personal Property Limit	7/1/2025	12/31/9999	48	1	441	PP
10664	BP	Personal Property Limit	7/1/2025	12/31/9999	48	2	717	PP
10664	1C	Real Property Limit	7/1/2025	12/31/9999	48	1	441	RP
10664	BO	Real Property Limit	7/1/2025	12/31/9999	48	2	717	RP
10664	7O	Vehicle Property Limit	7/1/2025	12/31/9999	48	1	441	VP
10664	BR	Vehicle Property Limit	7/1/2025	12/31/9999	48	2	717	VP

Technical Note:
Code Table 10664 Reference Table Columns:
- REFER_TABLE_1_DESCR = County Code
- REFER_TABLE_2_DESCR = Household Size
- REFER_TABLE_3_DESCR = Resource Limit
- REFER_TABLE_4_DESCR = GAGR Resource Limit Category (values in Short/Long Decode Name columns from CT 10701)

2.2.3 Programs Impacted

GA/GR Automated Solution

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 OUTREACH

4.1 Lists

List Name: Solano County GR Impacted Cases with In-Kind Income
List Criteria: All GA/GR Automated Solution cases that meet the following criteria:

 i. County is 'Solano'
 ii. Participant has an 'Active' GR program person status.
 iii. Participant has an 'Active' GR program status.
 iv. GR participant has an effective (high dated) Income record with the following details:
  a. Income Category is 'Income In-Kind – Earned' -OR- 'Income In-Kind – Unearned'
  b. Income Type is one of the following:
   - Utilities - Unearned
   - Utilities - Earned
   - Food - Unearned
   - Food - Earned
   - Clothing - Unearned
   - Clothing - Earned
   - Housing - Unearned
   - Housing - Earned

Standard Columns:
- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker ID

Additional Column(s):
- Income Person Name (Last Name, First Name)
- Income Category
- Income Type
- Income Begin Date

Frequency: One-time

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-288029

CalSAWS

California Statewide Automated Welfare System

THE POWER OF 58

CA-290530

Automatically Opt-Out the applicants from texting if the person is not active on any program

Table of Contents

CA-290530 Automatically Opt-Out the applicants from texting if the person is not active on any program

1 OVERVIEW

The Federal Communications Commission (FCC) declaratory ruling provided guidance to federal and state governmental agencies and their partners on the applicability of the Telephone Consumer Protection Act (TCPA) of 1991 when making automated calls or text messages. The ruling states that the TCPA does not apply to calls/texts that are initiated by DHCS for purposes of Medi-Cal.

The text messaging consent functionality in CalSAWS is differentiated by program to allow for consent. Currently, there is no automated process to auto opt-out the customers with closed programs. In other words, the customer needs to opt-out manually even though not active on any program of the case.

An individual phone number can only be opted in to text notification by a single customer at a time. Multiple customers cannot opt-in using the same phone number. If a secondary customer attempts to opt-in to text notifications, using an already opted-in phone number by a different customer, they will not be able to opt-in. The already opted-in customer would have to opt-out of text notifications first, before the secondary customer could successfully opt-in to text notification using that same phone number.

Customers may change their phone numbers over time but might not update their contact information in CalSAWS. This may be because the customer is no longer receiving benefits and has no reason to update their contact information. This causes CalSAWS to retain old opted-in phone numbers that are no longer in use by the customer associated with that opt-in. This prevents new customers from opting in who are now associated with that phone number.

This System Change Request (SCR) will make updates to support automated functionality to opt-out the applicants from texting if the person is not active on any program.

1.1 Current Design

Currently, there is no automated process to automatically opt-out a customer's phone number from text notifications, even if the customer is on a case with closed programs. Workers are manually opting out phone numbers from prior customers to opt-in new customers with the same phone number.

1.2 Requests

Update CalSAWS to support automatically opting individuals out of text notifications if the person is not active on any programs.

1.3 Overview of Recommendations

1. Create a batch job to automatically opt-out individuals from text notifications if the individual does not have any active programs for 45 or more days as of the batch run date.

2. Create a data change request to process the large initial population of the new automatically opt-out job (see prior recommendation).

1.4 Assumptions

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

2. Customers do not receive any opt-out text message notification, and the opt-out journal will be created similar to the other opt-out batch job functionality like No Response opt-out job and Domestic Violence opt-out job.

3. No changes to Self-Service Portal with this SCR.

4. Customers need to follow the current process to opt-in to text notifications after being opted out, including providing consent to text notifications by program and responding to an initial text notification to verify their phone number. Refer to SCR CA-224051 for further details.

5. The new batch job to automatically opt-out individuals from text notifications will not be county configurable. The functionality cannot work as designed if any county is excluded from processing.

2 RECOMMENDATIONS

2.1 No Programs Active Opt-Out Batch Job

2.1.1 Overview

CalSAWS does not support automated opt-out for text notifications for customers with closed programs.

CalSAWS will be updated to support automated opt-out of text notifications for customers with no active programs for 45 or more calendar days as of the batch run date. A new batch job will be created to identify customers eligible for automated opt-out.

Customers in the target population will be opted out from receiving text notifications. The batch job will be updated to also opt-out a person's program-level text notification opt-ins.

2.1.2 Description of Change

1. Create a new batch job that identifies the population to automatically opt-out customers from text notifications. The new batch job will do all the following:

    a. Identify the target customer population. The target customer population will be based on the following criteria:

        i. The customer is currently opted in to text notifications. A customer is opted into text notifications if at least one of the following applies to one of their listed phone numbers on the Contact Detail page:

            1. The Text Message value is "Opt-In".

            2. At least one Program Opt-In value is "Yes".

        ii. The customer has not participated in a program in 45 or more calendar days as of the batch run date. Non-participation will be determined by the following criteria:

            1. The customer is not on a program with a program status of 'Active', 'Pending', 'Non-Comp', 'Good Cause', 'Sanction', or 'Exempt' that meets <u>at least one</u> of the following criteria:

a. The batch run occurs between begin date and end date of the program status

b. Or program status begin date is for a date after the batch run.

c. Or any of the above program statuses end date is for a past date that is less than 45 calendar days before the batch runs.

d. Or any of the above program statuses were applied less than 45 calendar days before the batch runs, regardless of the status's effective date.

Technical Note: "Applied" - It's the date when the program status was created in the system.

iii. The customer does not have an appointment with a start date in the future with a 'Scheduled' or 'Rescheduled' status.

iv. The customer is not the primary applicant on any program that meets all the following criteria:
1. The program status is 'Active', 'Pending', 'Non-Comp', 'Good Cause', 'Sanction', or 'Exempt'.

2. The program's status end date is after the current batch run.

b. For the identified target customer population, perform all the following actions:

i. Opt-out the customer for program-level text notifications.

1. The programs to opt-out will be identified based on the following criteria on the Contact Detail page:
a. The Program Opt-In field value is 'Yes'.

2. Update the identified programs on Contact Detail page. Update the fields to the values described in the table below:

Field	New Value
Program Opt-In	No
Program Text Message Status	Opted-Out
Status Date	**Note:** The current date, when the status change took place

ii. Opt-out the customer's phone number from text notifications.
1. The phone number to opt-out will be identified based on the following criteria on the Contact Detail page:
   a. The Text Message value is "Opt-In".

2. Update the following Contact Detail page fields to the values described in the below table:

Field	New Value
Text Message	Opt Out
Text Message Status	Opted-Out

iii. Create a case journal for the opted-out customer for all the cases the customer is associated to in CalSAWS.
1. The created journal is the same as the journal that is created when the customer is opted-out through the Contact Detail page.
2. A customer is considered associated to a case if they appear under the "All People Associated with the Case" heading on the Case Summary page, regardless of Household Status.
3. If the customer has no associated cases in CalSAWS, no journal will be created. The customer will still be opted-out of text notifications, regardless of whether a journal is created.

2.1.3 Execution Frequency

Monthly, on the 9th business day of the month (Monday – Saturday).

2.1.4 Key Scheduling Dependencies

- Predecessors:
  o PB00C113 (Domestic Violence Opt-Out batch job)
  o PB00C945 (No Response Opt-Out batch job)
- Successors: All text notification campaign batch sweeps
  o Examples: PO00V101, PO00V103, etc.

2.1.5 Counties Impacted

All counties

2.1.6 Category

Core

2.1.7 Data Volume/Performance

Approximately 45 thousand records every month

2.1.8 Failure Procedure/Operational Instructions

Batch 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 Request – Opt Out

2.2.1 Overview

The new Opt-Out batch job created by this SCR would have a very large initial population to process. That would take a long time to process and would cause negative impacts to downstream batch jobs, waiting for the auto opt-out job to complete. The job's initial population will instead be processed through a data change.

2.2.2 Description of Change

1. Create a data change request that will auto opt-out customers. The data change request will do all of the following:

   a. Identify the target population. The Target population will be determined by the following criteria:

      i. Target the same population as defined for the new job created in the "No Programs Active Opt-Out Batch Job" section.

         Note: The auto-opt-out job's target population criteria references the date the "batch runs" multiple times. The data change request will substitute its own run date in these instances.

         For example, the original, "The **batch run** occurs between begin date and end date of the program status" would instead be treated as, "The **data change request** run occurs between begin date and end date of the program status"

   b. For the identified target customer population, perform all the following actions:

      i. Perform the same actions as defined for the new job created in the "No Programs Active Opt-Out Batch Job" section.

2.2.3 Estimated Number of Records Impacted/Performance

Approximately 3.9-million customers will be opted-out.