



Design

CA-216284

CalHEERS eHIT: MAGI Medi-Cal Budget Periods

DOCUMENT APPROVAL HISTORY

Prepared By	Cynthia Ridley, Erika Kusnadi-Cerezo, Renee Gustafson
Reviewed By	Geetha Ramalingam, Max Volf, Eric Haymes, Dylan Patel, Harish N, Vikas Mani, Sheron Jaikumar MI, Mansi M, William Baretsky

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
02/17/2025	0.1	Initial Draft	Cynthia Ridley, Kusnadi.E
05/06/2025	0.2	Updated MAGI Person Detail Mockup to match 25.6 code changes	Tisha Mutreja
05/08/2025	0.3	Updated Current Design, Requests, SCAI batches, MAGI Budget Detail mockups	Renee Gustafson
05/13/2025	0.4	Updated MAGI Budget Detail section, eHIT section, MAGI Person Detail, Requests, Overview of Recommendations	Renee Gustafson
05/16/2025	0.5	Updated eHIT section for saving totalRPAISCAIAmount, Income Proof Required, and Beneficiary ind.	Renee Gustafson
05/20/2025	0.6	Clarified batch skip for pending verification and added skip for 7J	Renee Gustafson
05/21/2025	0.7	Added Income Detail page updates for e-Data and removed e-data rec from eHIT section	Renee Gustafson
05/22/2025	0.8	Confirmed Accessibility for page changes	Renee Gustafson
05/28/2025	0.9	Final Draft sent to Committee	Renee Gustafson
06/12/2025	1.0	Clarified Frequency and Data Volume for batches. Added Expense mappings and corrected typos.	Renee Gustafson
6/13/2025	1.1	Added examples for Beneficiary Indicator	Renee Gustafson

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	6
1.3	Overview of Recommendations	7
1.4	Assumptions.....	8
2	RECOMMENDATIONS	9
2.1	Income Amount Detail.....	9
2.2	Income Detail.....	12
2.3	Expense Amount Detail	14
2.4	Expense Contributors Detail	17
2.5	MAGI Budget Detail.....	19
2.6	MAGI Person Detail.....	30
2.7	Tax Household Detail Page	34
2.8	Medi-Cal Reasonable Explanation Detail	35
2.9	SCAI Re-evaluation Batch MAGI Sweep	37
2.10	SCAI Re-evaluation Batch EDBC Sweep Job	39
2.11	Batch EDBC Skips	41
2.12	eHIT.....	43
2.13	Data Change.....	50
2.14	Automated Regression Test	50

CA-216284 – CalHEERS eHIT: MAGI Medi-Cal Income Budget Periods

1 OVERVIEW

ACWDL 21-04 provides guidance to counties on Modified Adjusted Gross Income (MAGI) Medi-Cal income calculations and introduces the utilization of multiple budget periods for counting income. The Center for Medicare and Medicaid Services (CMS) allows states to select three different budget periods on which to base MAGI Medi-Cal eligibility. California elected to use all three budget period methodologies. The methodologies are as follows:

- Current Monthly Income (CMI)
- Reasonably Projected Annual Income (RPAI)
- System Calculated Annual Income (SCAI)

This change is in conjunction with CalHEERS CR 151332. CalHEERS will update their Business Rules Engine (BRE) to utilize the three MAGI Budget Periods.

1.1 Current Design

Currently in CalSAWS, users can enter Income and Expense information with begin dates up to 5 months into the future from the system date. Due to this system limitation, when an individual reports they have fluctuating income and provides future anticipated income more than 5 months into the future, users manually calculate the projected annual income and enter it in the Income Detail page as 'Annual' income or in the Tax Household Detail page as Projected Annual Income for MAGI and Covered California Exchange determinations.

CalSAWS sends Income Detail records as income data to CalHEERS in an EDR if the income record is effective 01/01/2014 or later based on an eHIT income type mapping. One such mapping is for IHSS 'Caregiver Wages – Other'. If the 'MAGI Medi-Cal: Lives with IHSS Recipient' is not checked on the Income detail page, then CalSAWS sends the income as 'Salary/Wages' ('Work' in eHIT). If the 'MAGI Medi-Cal: Lives with IHSS Recipient' is checked, then CalSAWS does not send the income in the EDR so CalHEERS will not use it in the MAGI budget.

CalSAWS sends Expense Detail records as deductions to CalHEERS in an EDR if the expense record is effective 01/01/2014 or later based on an eHIT deduction type mapping. The mapping includes all the Expense types in the 'MAGI Expense' category and 'Spousal Support – Court Ordered' in both the 'MAGI Expense' and the 'Child/Spousal Support - Court Ordered' categories.

CalSAWS sends the Projected Annual Income (PAI) value from the Tax Household Detail page to CalHEERS in an EDR as PAI.

Tax Household Detail

*- Indicates required fields

Save

Cancel

Name:

Jackson, Jennifer 24F

Primary Tax Filer: *

Yes

Filing Year: *

2024

Is this person expected to be required to file taxes for the current year? *

Yes

Is this person planning to file taxes for the current year? *

Yes

Expected Filing Status: *

Married Filing Jointly

Married Filing Jointly Exception: *

No

Tax Filing Status Association *

Jackson, Jim 24M

Caretaker Relative:

Is this person expected to be claimed as a Dependent by a non-custodial parent?

No

Who claims this person as a Dependent this year?

-Select-

Projected Annual Income

Projected Annual Income Amount:

Is the Projected Annual Income amount correct?

CalHEERS uses the income and deduction data to determine a system calculated CMI and PAI, and treats the PAI provided in the EDR as an 'overridden' PAI in the MAGI budget and the Subsidy income calculations.

CalSAWS displays the MAGI Budget information provided in the DER on the 'MAGI Budget Detail' page.

MAGI Budget Detail

Close

Name:

Jennifer Jacksen

MAGI Medi-Cal Monthly Income Budget

Current Monthly Income:

\$2,576.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Name	Category	Business	Type	Amount
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00
Jennifer Jacksen	Other Income	SDI	Social Security Disability	\$14.00
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00

Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Current Monthly Income After Deductions:

\$2,451.00

Projected Annual Income (Monthly Amount):

\$2,089.00

Total Countable Income:

\$2,089.00

Name	Type	Amount
Jim Jacksen	Current Monthly Income	\$1,362.00
Jim Jacksen	Projected Annual Income (Monthly Amount)	\$1,000.00
Jennifer Jacksen	Current Monthly Income	\$1,089.00

Non Countable Income:

\$12.00

Name	Category	Business	Type	Amount
Baby Jacksen	Employment Income		Salary, Wages	\$12.00

Non Countable Deductions:

\$250.00

Name	Type	Amount
Baby Jacksen	Health Savings Account	\$250.00

Total Household Members:

3

Name
Jim Jacksen
Jennifer Jacksen
Baby Jacksen

Federal Poverty Level:

\$2,221.00

FPL% for Individual:

94.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

No

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

No

Person Disability Indicator:

No

Close

CalSAWS collects a Medi-Cal Reasonable Explanation that includes both Verification Types of Current Monthly Income (CMI) and Projected Annual Income (PAI).

Medi-Cal Reasonable Explanation Detail

* - Indicates required fields

Name: *
Jacksen, Jennifer 24F

Type: *
Income

Verification Type: *
☐ Current Monthly Income (CMI)
☒ Projected Annual Income (PAI)

Reason: *
Change in Marital Status

Begin Month: *
05/2025

End Month:

Save and Return Cancel

Save and Return Cancel

CalSAWS sends the Reasonable Explanation Verification Type in the EDR based on the type(s) selected in the Medi-Cal Reasonable Explanation Detail page and displays Medi-Cal Reasonable Explanation 'Verification Type' sent in an EDR and received in a DER on the MAGI Person Detail page.

Income

Projected Annual Income

Projected Annual Amount: \$100.00

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
No Data Found						

Medi-Cal Reasonable Explanation

Reason	Status	Verification Type	Reasonable Explanation
Change in Marital Status	Reasonable Explanation	Projected Annual Income (PAI)	

CalSAWS sends the MAGI Current Monthly Income Administrative Verification based on the verification status of actual income records or based on the MAGI Verification of No Income. CalSAWS displays the Administrative or e-Verification of MAGI Current Monthly Income on the MAGI Person Detail page as follows:

Verification
Verification Type
SSN
SSN Waiver
Applied for SSN
US Citizenship
Immigration Status
Lawful Presence
Qualified Non-Citizen
Five Year Bar Exempt/Met
PRUCOL
PRUCOL - INS Ack
MAGI Current Monthly Income
MAGI Projected Annual Income
Federal Subsidy Income
State Subsidy Income

CalHEERS sends plain language Verification Interpretations to CalSAWS for some verifications. CalSAWS displays this as 'eHIT Response' hover over on the Verif Status on the MAGI Person Detail page. The eHIT logic references the CalHEERS Verification Response Description code table (CT_10764) and if the Interpretation text matches exactly to the text in the code table, only the code is saved to the Verification record in CalSAWS database to save space. If the Interpretation text doesn't match exactly to a row in the code table, the full text is saved to the CalSAWS database in the Verification record.

Verification					
E-Verified		Admin Verified			
Verification Type	Verified	Attested Value	Verif Status	Verif Source	Verif Cache Date
SSN	Yes	123456789	E-Verified	FDSH:SSA	01/20/2026
SSN Waiver					
Applied for SSN					
US Citizenship					
Immigration Status					
Lawful Presence					
Qualified Non-Citizen					
Five Year Bar Exempt/Met					
PRUCOL					
PRUCOL - INS Ack					
MAGI Current Monthly Income					
MAGI Projected Annual Income	No		Not V		
Federal Subsidy Income	No	1500.00	Not Verified		
State Subsidy Income	No	1500.00	Not Verified		
MEC MEDS	No	No	E-Verified	MEDS	01/20/2026

eHit Response
The individual could not be verified

1.2 Requests

With CalHEERS Change Request 151332, CalHEERS will introduce two new MAGI Budget Calculation methods:

- System Calculated Annual Income (SCAI): The income and deductions for the entire calendar year.
- Reasonably Projected Annual Income (RPAI): A calculation of 12 rolling months of income and deductions based on the EDR benefit month. CalHEERS may also freeze the RPAI and use the frozen RPAI in a future MAGI Determination.

To reduce the need for users to calculate the annual income for fluctuating income, update CalSAWS to allow users to enter income and expense information up to 12 months into the future.

CalHEERS will use the income and deduction information sent in the EDR to determine SCAI, RPAI and CMI MAGI budget calculations. CalHEERS will send the MAGI budget calculation method used in the budget and provide SCAI and RPAI calculations. CalHEERS will also send plain language Verification Interpretations for Income Verifications when SCAI or RPAI is used. Update the MAGI Budget Detail page to display the new budgeting information received in a DER. Update the MAGI Person Detail page to display the new eHIT responses received for Income based on SCAI or RPAI.

Per DHCS, an individual who is MAGI Eligible based on SCAI budgeting methodology must be reevaluated in January of the following year. Add batch jobs to CalSAWS to automate the MAGI reevaluation for any individual eligible via SCAI.

CalHEERS will no longer use the PAI amount collected in the 'Tax Household Page' as a calculation methodology for MAGI but will continue to use it as 'Overridden PAI' for Covered California Exchange programs. Update the historical MAGI budgets where PAI method was used to indicate its MAGI PAI historical. Update the Tax Household Page label to indicate the PAI is for Exchange only. Update the MAGI Person Detail page to indicate the PAI is for Exchange only in both the income section and verification section. Update the MAGI Person Detail page to indicate the Verification of 'MAGI Current Monthly Income' is for 'MAGI Income'.

The Reasonable Explanation (REX) Verification Type of 'Projected Annual Income (PAI)' no longer applies. CalHEERS will always use 'Current Monthly Income (CMI)' for REX and CalHEERS will apply it to SCAI, RPAI or CMI MAGI budget calculations as appropriate. Remove the 'Verification Type' options on the Medi-Cal Reasonable Explanation page. Default eHIT to always send Verification Type 'CMI' and update the decode for historical Verification Types of PAI to display 'MAGI PAI (Historical)' if a user views an historical EDR or DER.

SCAI budgeting methodology is only permitted to be used for Medi-Cal beneficiaries and is not applicable for new applicants. A 'Beneficiary Indicator' will be added to eHIT to allow CalSAWS to inform CalHEERS when an individual was a beneficiary on cash-based Medi-Cal or Medi-Cal in the month prior to the first evaluation for MAGI so SCAI can be used, if applicable.

IHSS income is countable in a MAGI budget only if the person does not live with the recipient, but it is countable for exchange programs regardless if they live with the recipient or not. A new eHIT Income Type for 'IHSS' will be added along with an indicator to specify if they live with the recipient. Update the eHIT income mappings for IHSS 'Caregiver Wages – Other' to send and receive as 'IHSS' Income and set the indicator to "Yes" if the checkbox is checked on the income page.

CalHEERS added more static text that will be sent to CalSAWS in eHIT verification Interpretations. Update the CalHEERS Verification Response Description code table with the new text values

1.3 Overview of Recommendations

1. The Income Amount Detail page allows users to add or edit an income amount. This SCR will update the page to allow users to enter an income amount that is up to 12 months in the future from the system date.
2. Update the Income Detail page to display e-Data for 'Lives with IHSS Recipient' received in an unsolicited DER.
3. The Expense Amount Detail page allows users to access, edit and create expense amount details. This SCR will update the page to allow users to enter an expense amount that begins and/or ends up to 12 months into the future from the system date.
4. The Expense Contributors Detail page allows users to add, edit or view expense contributors for a specified time period. This SCR will update the page to allow users to enter an expense contributor that begins and/or ends up to 12 months into the future from the system date.
5. Update the MAGI Budget Detail page design layout and add additional elements to display the new MAGI Budget Period Income period information received from CalHEERS.
6. Update the MAGI Person Detail page to display the newly added and updated elements for the EDR and DER.
7. Update the 'Tax Household Detail' page 'Projected Annual Income' section label to also indicate it is for Exchange only.
8. Update the 'Medi-Cal Reasonable Explanation Detail' page to no longer display the 'Verification Type'.
9. Create a new 'SCAI Re-evaluation' Batch MAGI Sweep job to identify individuals who are eligible on MAGI Medi-Cal due to the SCAI MAGI Medi-Cal Budget Methodology for reevaluation in January of the following year.
10. Create a new 'SCAI Re-evaluation Batch EDBC Sweep' job to process EDBC for programs where the 'SCAI Re-evaluation' DER returned.
11. Add new batch EDBC skip reasons to skip Medi-Cal programs from processing EDBC when the DER from 'SCAI Re-evaluation' has income verification pending, or an Active Medi-Cal Member is losing MAGI coverage, or any Member is on aid code 7J without Full Medi-Cal Hierarchy set to Yes.
12. Update eHIT logic to receive and display additional MAGI Budget information from CalHEERS. Update eHIT logic to communicate IHSS income type and Lives with Recipient Indicator. Update eHIT outbound logic to communicate Beneficiary Indicator when an individual is transitioning from cash-based or Non-MAGI Medi-Cal to MAGI, and they are evaluated by CalHEERS for the first

- time. Update eHIT to default 'CMI' Verification Type for Reasonable Explanation.
13. Run a one-time data change to convert the existing values for 'PAI/CMI used' in the historical MAGI Budget to the new field for 'Income Calculation Methodology Used'.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of the design.
2. There are no impacts to MEDS or other EDBC programs income and expense calculations as a result of extending the date limit from 5 months to 12 months on the Income and Expense pages. The other EDBC rules will still calculate income and expenses accordingly and pro-rate if appropriate.
3. eHIT Schema is updated to version 23 with SCR CA-283790 in the same release.
4. Some minor cosmetic changes are out of scope for this SCR and will be updated with future SCR CA-291047. These are pointed out in the eHIT section.

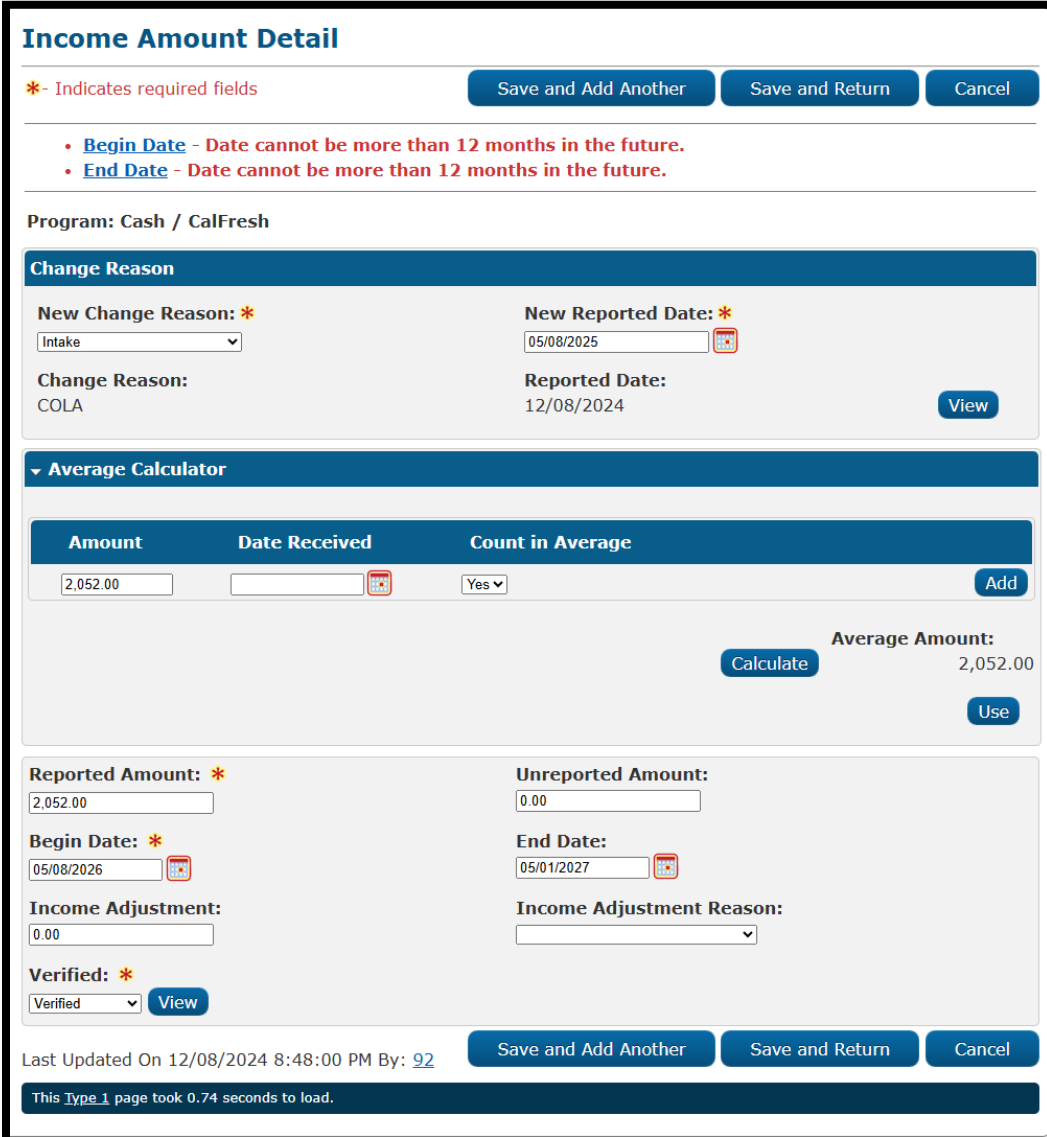
2 RECOMMENDATIONS

2.1 Income Amount Detail

2.1.1 Overview

The Income Amount Detail page allows users to add or edit an income amount. This SCR will update the page to allow users to enter an income amount that is up to 12 months in the future from the system date.

2.1.2 Income Amount Detail Page Mockup



Income Amount Detail

* - Indicates required fields

Save and Add Another Save and Return Cancel

- **Begin Date** - Date cannot be more than 12 months in the future.
- **End Date** - Date cannot be more than 12 months in the future.

Program: Cash / CalFresh

Change Reason

New Change Reason: *
Intake

New Reported Date: *
05/08/2025

Change Reason:
COLA

Reported Date:
12/08/2024

View

▼ Average Calculator

Amount	Date Received	Count in Average
2,052.00		Yes

Add

Calculate Average Amount: 2,052.00

Use

Reported Amount: *
2,052.00

Unreported Amount:
0.00

Begin Date: *
05/08/2026

End Date:
05/01/2027

Income Adjustment:
0.00

Income Adjustment Reason:

Verified: *
Verified

View

Last Updated On 12/08/2024 8:48:00 PM By: 92

Save and Add Another Save and Return Cancel

This Type_1 page took 0.74 seconds to load.

Figure 2.1.1 – Income Amount Detail Page (with updated validation messages)

Income Amount Detail

*- Indicates required fields

EditClose

Program: Cash / CalFresh

Change Reason

Change Reason: Intake

Reported Date: 05/01/2025

View

Average Calculator

Amount	Date Received	Count in Average
2,052.00		Yes

Reported Amount: *
2,052.00

Begin Date: *
01/01/2026

Income Adjustment:
0.00

Verified: *
Verified View

Unreported Amount:
0.00

End Date:
03/01/2026

Income Adjustment Reason:

Figure 2.1.2 – Income Amount Detail Page

2.1.3 Description of Changes

1. Update the following validation messages and their corresponding logic from the Income Amount Detail page:
 - a. Update the validation message: “Begin Date – Date cannot be more than 5 months in the future.” to “Begin Date – Date cannot be more than 12 months in the future.”
 - i. Update the logic to display the validation message when the user clicks on the ‘Save and Add Another’ or ‘Save and Return’ button and the date entered on the Begin Date field is 12 months from the system date.
 - b. Update the validation message: “End Date – Date cannot be more than 5 months in the future.” to “End Date – Date cannot be more than 12 months in the future.”
 - i. Update the logic to display the validation message when the user clicks on the ‘Save and Add Another’ or ‘Save and Return’ button and the date entered on the End Date field is 12 months from the system date.
 - c. This will apply for all programs: Medi-Cal, Cash/CalFresh, Actuals (TMC/Pickle)

2. Update the date picker on both the Begin Date and End Date field to allow users to select a date that is 12 months in the future from the system date, but not more than 12 months in the future.

Note: Currently, the date picker will only allow users to select a date that is up to 5 months in the future from the system date.

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

Accessibility was assessed for the Income Amount Detail page and no changes are needed on the page.

2.1.8 Page Usage/Data Volume Impacts

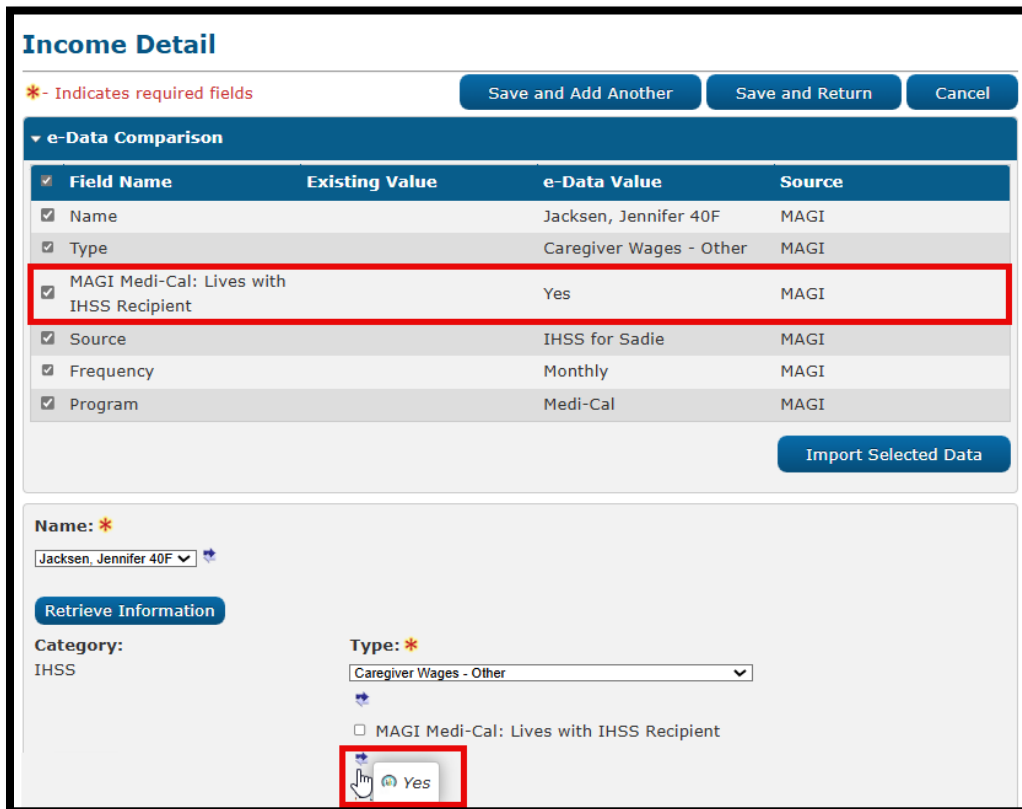
N/A

2.2 Income Detail

2.2.1 Overview

Update the Income Detail page to display e-Data for 'Lives with IHSS Recipient' received in an unsolicited DER.

2.2.2 Income Detail Page Mockup



The mockup shows the 'Income Detail' page. At the top, there are three buttons: 'Save and Add Another', 'Save and Return', and 'Cancel'. Below these is a section titled 'e-Data Comparison' which contains a table. The table has four columns: 'Field Name', 'Existing Value', 'e-Data Value', and 'Source'. The rows are: 'Name' (Jacksen, Jennifer 40F), 'Type' (Caregiver Wages - Other), 'MAGI Medi-Cal: Lives with IHSS Recipient' (Yes), 'Source' (IHSS for Sadie), 'Frequency' (Monthly), and 'Program' (Medi-Cal). The row for 'MAGI Medi-Cal: Lives with IHSS Recipient' is highlighted with a red border. Below the table is an 'Import Selected Data' button. Underneath the table is a form for 'Name' (Jacksen, Jennifer 40F) and a 'Retrieve Information' button. Below that is a 'Category' dropdown set to 'IHSS' and a 'Type' dropdown set to 'Caregiver Wages - Other'. Below the 'Type' dropdown is a checkbox for 'MAGI Medi-Cal: Lives with IHSS Recipient' which is checked, and a 'Yes' button is highlighted with a red border.

Field Name	Existing Value	e-Data Value	Source
Name	Jacksen, Jennifer 40F		MAGI
Type	Caregiver Wages - Other		MAGI
MAGI Medi-Cal: Lives with IHSS Recipient		Yes	MAGI
Source	IHSS for Sadie		MAGI
Frequency	Monthly		MAGI
Program	Medi-Cal		MAGI

Import Selected Data

Name: Jacksen, Jennifer 40F

Retrieve Information

Category: IHSS

Type: Caregiver Wages - Other

☒ MAGI Medi-Cal: Lives with IHSS Recipient

Yes

Figure 2.2.2.1 – Income Detail Page Mockup displaying e-Data for 'MAGI Medi-Cal: Lives with IHSS Recipient'

2.2.3 Description of Changes

1. Update Income Detail page to display the e-Data received for 'MAGI Medi-Cal: Lives with IHSS Recipient' in an unsolicited DER when the Income Type is 'Caregiver Wages – Other' as follows:
 - a. Add the option in the e-Data Comparison table as shown in Figure 2.2.2.1.
 - b. Add an e-Data arrow option below the 'MAGI Medi-Cal: Lives with IHSS Recipient' checkbox.
 - c. When user either clicks on 'Import Selected Data' button with 'MAGI Medi-Cal: Lives with IHSS Recipient' field name selected in e-Data Comparison table, or clicks on the e-Data arrow to accept the e-Data value next to the field itself, then do the following:
 - i. If the Value is 'Yes', check the 'MAGI Medi-Cal: Lives with IHSS Recipient' checkbox.
 - ii. If the value is No or blank, remove the 'MAGI Medi-Cal: Lives with IHSS Recipient' check if it is already checked; otherwise, do nothing so the checkbox remains unchecked.

Note: The 'MAGI Medi-Cal: Lives with IHSS Recipient' checkbox only displays on the Income Detail page when the Income Type is 'Caregiver Wages – Other'. This conditional display functionality is not changing.

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

2.2.8 Page Usage/Data Volume Impacts

N/A

2.3 Expense Amount Detail

2.3.1 Overview

The Expense Amount Detail page allows users to access, edit and create expense amount details. This SCR will update the page to allow users to enter an expense amount that begins and/or ends up to 12 months into the future from the system date.

2.3.2 Expense Amount Detail Mockup

Expense Amount Detail

*- Indicates required fields

Save and Return Cancel

- **Begin Date** - Date cannot be more than 12 months in the future.
- **End Date** - Date cannot be more than 12 months in the future.

Change Reason

New Change Reason: * Intake

New Reported Date: * 05/01/2025

Change Reason:

Reported Date:

Amount: * 100.00

Amount Paid by Others: 0.00

Name of Others who Paid:

Begin Date: * 05/08/2026

End Date: 10/08/2026

Verified: * Pending View

Save and Return Cancel

This Type 1 page took 2.35 seconds to load.

Figure 2.3.1 – Expense Amount Detail Page (with updated validation messages)

Expense Amount Detail

*- Indicates required fields

EditClose

Change Reason

Change Reason:

Participant Provided - Verbal

Reported Date:

05/08/2025

View

Amount: *

100.00

Amount Paid by Others:

0.00

Name of Others who Paid:

Begin Date: *

01/01/2026

End Date:

03/01/2026

Verified: *

Pending

View

EditClose

Last Updated On 05/08/2025 4:15:59 PM By: [1409355](#)

This [Type 1](#) page took 0.40 seconds to load.

Figure 2.3.2 – Expense Amount Detail Page

2.3.3 Description of Changes

- Update the following validation messages and their corresponding logic from the Expense Amount Detail page:
 - Update the validation message: "Begin Date – Date cannot be more than 5 months in the future." to "Begin Date – Date cannot be more than 12 months in the future."
 - Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the Begin Date field is 12 months from the system date.
 - Update the validation message: "End Date – Date cannot be more than 5 months in the future." to "End Date – Date cannot be more than 12 months in the future."
 - Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the End Date field is 12 months from the system date.
- Update the date picker on both the Begin Date and End Date field to allow users to select a date that is 12 months in the future from the system date, but not more than 12 months in the future.

Note: Currently, the date picker will only allow users to select a date that is up to 5 months in the future from the system date.

2.3.4 Page Location

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

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Accessibility

Accessibility was assessed for the Income Amount Detail page and no changes are needed on the page.

2.3.8 Page Usage/Data Volume Impacts

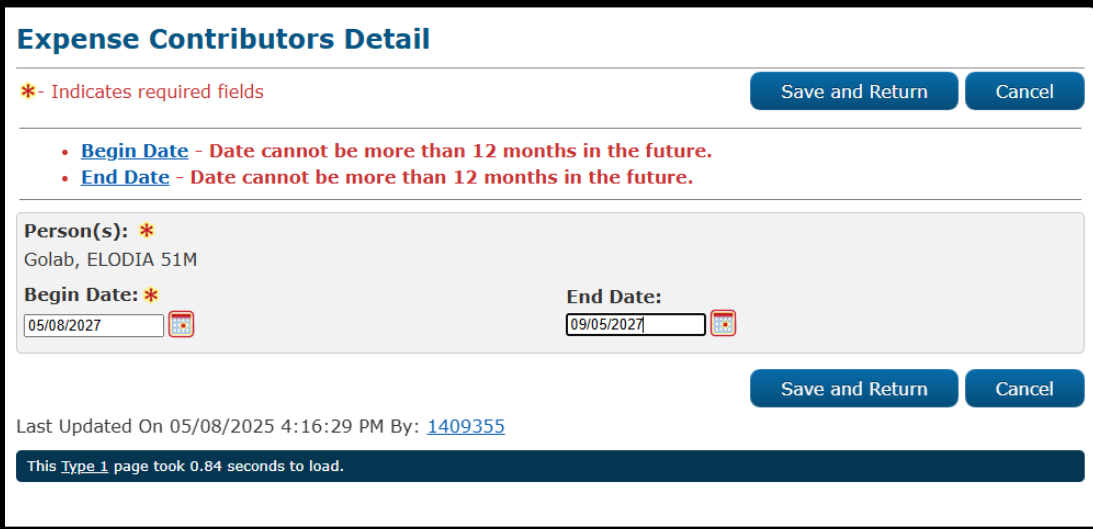
N/A

2.4 Expense Contributors Detail

2.4.1 Overview

The Expense Contributors Detail page allows users to add, edit or view expense contributors for a specified time period. This SCR will update the page to allow users to enter an expense contributor that begins and/or ends up to 12 months into the future from the system date.

2.4.2 Expense Contributors Detail Mockup



Expense Contributors Detail

*- Indicates required fields

Save and Return Cancel

- **Begin Date** - Date cannot be more than 12 months in the future.
- **End Date** - Date cannot be more than 12 months in the future.

Person(s): *
Golab, ELODIA 51M

Begin Date: * 05/08/2027

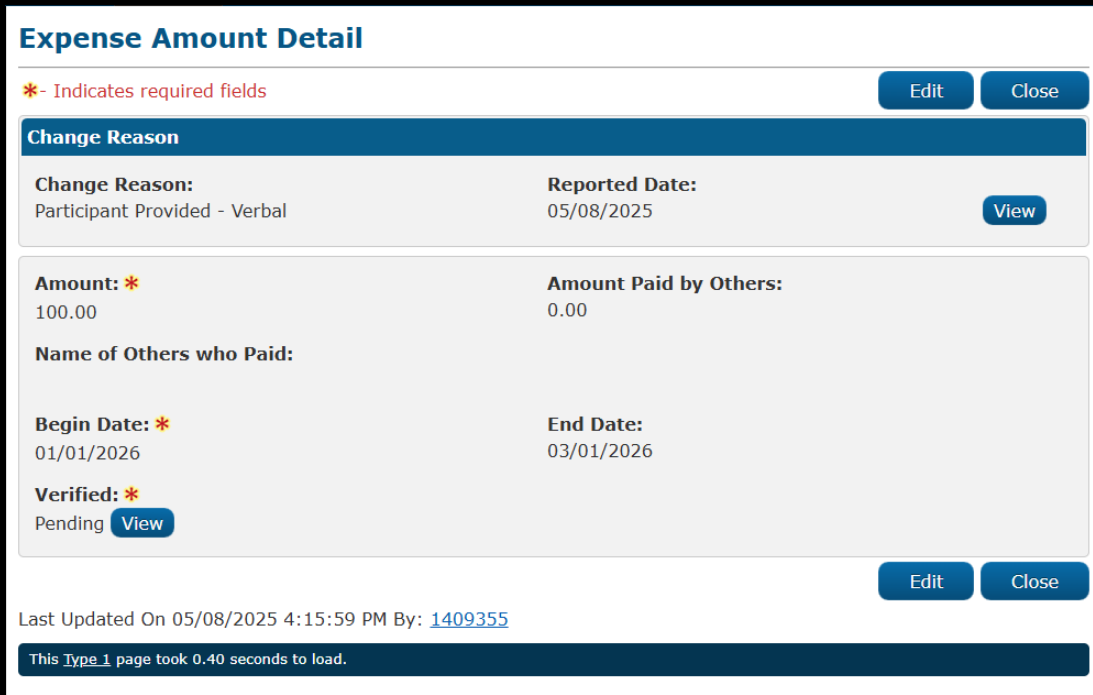
End Date: 09/05/2027

Save and Return Cancel

Last Updated On 05/08/2025 4:16:29 PM By: [1409355](#)

This Type 1 page took 0.84 seconds to load.

Figure 2.4.2.1 – Expense Contributors Detail Page (with updated validation messages)



Expense Amount Detail

*- Indicates required fields

Edit Close

Change Reason

Change Reason: Participant Provided - Verbal

Reported Date: 05/08/2025

View

Amount: * 100.00

Amount Paid by Others: 0.00

Name of Others who Paid:

Begin Date: * 01/01/2026

End Date: 03/01/2026

Verified: * Pending View

Edit Close

Last Updated On 05/08/2025 4:15:59 PM By: [1409355](#)

This Type 1 page took 0.40 seconds to load.

Figure 2.4.2.2 – Expense Contributors Detail Page

2.4.3 Description of Changes

1. Update the following validation messages and their corresponding logic from the Expense Contributors Detail page:
 - a. Update the validation message: "Begin Date – Date cannot be more than 5 months in the future." to "Begin Date – Date cannot be more than 12 months in the future."
 - i. Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the Begin Date field is 12 months from the system date.
 - b. Update the validation message: "End Date – Date cannot be more than 5 months in the future." to "End Date – Date cannot be more than 12 months in the future."
 - i. Update the logic to display the validation message when the user clicks on the 'Save and Return' button and the date entered on the End Date field is 12 months from the system date.
2. Update the date picker on both the Begin Date and End Date field to allow users to select a date that is 12 months in the future from the system date, but not more than 12 months in the future.

Note: Currently, the date picker only allows users to select a date that is up to 5 months in the future from the system date.

2.4.4 Page Location

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

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Accessibility

Accessibility was assessed for the Income Amount Detail page and no changes are needed on the page.

2.4.8 Page Usage/Data Volume Impacts

N/A

2.5 MAGI Budget Detail

2.5.1 Overview

Update the MAGI Budget Detail page design layout and add additional elements to display the new MAGI Budget Period Income period information received from CalHEERS.

2.5.2 MAGI Budget Detail Page Mockup

MAGI Budget Detail

Close

Name:
Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00
Total Employment Monthly Income:				\$2,200.00
Total Self Employment Monthly Income:				\$362.00
Total Other Monthly Income:				\$14.00
Total Current Monthly Income:				\$2,576.00
Total Non-Countable Income:				\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

\$2,589.00

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount:

\$2,875.00

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:

CMI

Total Household Members:

3

Total Countable Income:

\$2,451.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

113.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

No

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

No

Person Disability Indicator:

No

Figure 2.5.2.1 MAGI Budget Detail page with CMI Income Calculation Method Used

MAGI Budget Detail

Close

Name:

Jennifer Jackson

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jackson	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jackson	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jackson	Self-Employment Income		Self Employment	\$362.00
Jim Jackson	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$12.00

Name	Category	Business	Type	Amount
Baby Jackson	Employment Income		Salary, Wages	\$12.00

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jackson	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$250.00

Name	Type	Amount
Baby Jackson	Health Savings Account	\$250.00

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

\$2,089.00

Total Annual Amount:

\$25,068.00

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount:

\$2,875.00

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:

RPAI

Total Household Members:

3

Total Countable Income:

\$2,089.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

97.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

Person Disability Indicator:

No

Figure 2.5.2.2 MAGI Budget Detail page with RPAI Income Calculation Method Used

MAGI Budget Detail

Close

Name:

Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

\$2,089.00

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

2026

Total Monthly Amount:

\$1,875.00

Total Annual Amount:

\$22,500.00

MAGI Household Budget Used

Income Calculation Method Used:

SCAI

Total Household Members:

3

Total Countable Income:

\$1,875.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

87.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer

No

Household Composition for MAGI Medi-Cal:

Meets 435.603(i) Exception to Use APTC Income/Deduction

No

Calculations for MAGI Medi-Cal Determination:

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to

No

Dependent Child Under Age 19 without Minimum Essential Coverage:

Person Disability Indicator:

No

Figure 2.5.2.3 MAGI Budget Detail page with SCAI Income Calculation Method Used

MAGI Budget Detail
Close

Name:
Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00
Total Employment Monthly Income:				\$2,200.00
Total Self Employment Monthly Income:				\$362.00
Total Other Monthly Income:				\$14.00
Total Current Monthly Income:				\$2,576.00
Total Non-Countable Income:				\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:
\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00
Total Non-Countable Deductions:		\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:
\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:
Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:
Total Monthly Amount:
Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:
MAGI PAI (Historical)

Total Household Members:
3

Total Countable Income:
\$2,043.00

Federal Poverty Level:
\$2,152.00

FPL% for Individual:
94.00%

MAGI Medi-Cal Eligible:
Yes

Medi-Cal Access Program (MCAP) Eligible:
No

County Children's Health Initiative Program (CCHIP) Eligible:
No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:
No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer
No

Household Composition for MAGI Medi-Cal:
No

Meets 435.603(i) Exception to Use APTC Income/Deduction
No

Calculations for MAGI Medi-Cal Determination:

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to
No

Dependent Child Under Age 19 without Minimum Essential Coverage:

Person Disability Indicator:
No

Figure 2.5.2.4 – MAGI Budget Detail page with MAGI PAI (Historical) Income Calculation Method Used when viewing historical MAGI PAI budgets

CalSAWS CA-21 6284 CalHEERS eHIT: MAGI Medi-Cal Income Budget Periods

22

MAGI Budget Detail

Close

Name:

Jennifer Jacksen

Current Monthly Income (CMI)

Name	Category	Business	Type	Amount
Jennifer Jacksen	Employment Income		Salary, Wages	\$1,200.00
Jennifer Jacksen	Other Income	Jolly	Social Security Retirement	\$14.00
Jim Jacksen	Self-Employment Income		Self Employment	\$362.00
Jim Jacksen	Employment Income		Salary, Wages	\$1,000.00

Total Employment Monthly Income:

\$2,200.00

Total Self Employment Monthly Income:

\$362.00

Total Other Monthly Income:

\$14.00

Total Current Monthly Income:

\$2,576.00

Total Non-Countable Income:

\$0.00

Name	Category	Business	Type	Amount
No Data Found				

Total Allowable Deductions:

\$125.00

Name	Type	Amount
Jennifer Jacksen	Moving expenses	\$125.00

Total Non-Countable Deductions:

\$0.00

Name	Type	Amount
No Data Found		

Total Current Monthly Income After Deductions:

\$2,451.00

Reasonably Projected Annual Income (RPAI) After Deductions

Total Monthly Amount:

Total Annual Amount:

System Calculated Annual Income (SCAI) After Deductions

Calendar Year:

Total Monthly Amount:

Total Annual Amount:

MAGI Household Budget Used

Income Calculation Method Used:

CMI

Total Household Members:

3

Total Countable Income:

\$2,451.00

Federal Poverty Level:

\$2,152.00

FPL% for Individual:

113.00%

MAGI Medi-Cal Eligible:

Yes

Medi-Cal Access Program (MCAP) Eligible:

No

County Children's Health Initiative Program (CCHIP) Eligible:

No

Unmarried Pregnant Woman Under 21 Income Disregard Applies:

No

Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer Household Composition for MAGI Medi-Cal:

No

Meets 435.603(i) Exception to Use APTC Income/Deduction Calculations for MAGI Medi-Cal Determination:

No

Meets 435.119(c): Adults Ineligible to the New Adult Group Due to Dependent Child Under Age 19 without Minimum Essential Coverage:

No

Person Disability Indicator:

No

Figure 2.5.2.5 – MAGI Budget Detail page with CMI Income Calculation Method Used when viewing historical CMI budgets

2.5.3 Description of Changes

1. Redesign the layout of the MAGI Budget Detail Page to display as specified below and referenced in the mockups in 2.5.2:
 - a. Rename the “MAGI Medi-Cal Monthly Income Budget” section label to “Current Monthly Income (CMI)”
 - b. Update the “Current Monthly Income (CMI)” (originally labeled as MAGI Medi-Cal Monthly Income Budget) section to display the following information in the below order:
 - i. First, create an invisible 3 column table within the section with left indent 5%. The following recommendations are within the first two columns; labels in the first column left justified and the amounts in the second column, right justified. Third column is blank. The Amount column for all values in this subsection should line up with each other:
 1. Display the “Total Employment Monthly Income:” information.
 - a. “Total Employment Monthly Income:” is not bolded.
 2. Display the “Total Self Employment Monthly Income:” information.
 - a. “Total Self Employment Monthly Income:” is not bolded.
 3. Display the “Total Other Monthly Income:” information.
 - a. “Total Other Monthly Income:” is not bolded.
 4. Display the “Total Current Monthly Income:” information.
 - a. Relabel “Current Monthly Income:” to “Total Current Monthly Income:”
 - b. “Total Current Monthly Income:” is bolded.
 5. Display the “Total Non-Countable Income:” information.
 - a. Relabel “Non Countable Income:” to “Total Non-Countable Income:”
 - b. “Total Non-Countable Income:” is not bolded.
 6. Display the Non-Countable Income table.
 - a. The table displays right below the “Total Non-Countable Income:” information.
 7. Display the “Total Allowable Deductions:” information.
 - a. Relabel “Allowable Deductions:” to “Total Allowable Deductions:”
 - b. “Total Allowable Deductions:” is bolded.
 8. Display the Allowable Deductions table
 - a. The table displays right below the “Total Allowable Deductions:” information.
 9. Display the “Total Non-Countable Deductions:” information.
 - a. Relabel “Non Countable Deductions:” to “Total Non-Countable Deductions:”
 - b. “Total Non-Countable Deductions:” is not bolded.

- ii. Outside the invisible table and in the next row, display "Total Current Monthly Income After Deductions:"
 1. "Total Current Monthly Income After Deductions:" is bolded. Left align the label and right align the amount. Left align the label with the labels in the below sections and right align the amount with amounts in the below sections.
- c. Remove the "Projected Annual Income (Monthly Amount)" row.

Note: This budget is no longer calculated by CalHEERS. For historical MAGI budgets where PAI was used, this amount displays in 'Total Countable Income' with Income Calculation Method Used as 'MAGI PAI (Historical)'.
- d. Move "Total Countable Income" row to the new 'MAGI Household Budget Used' section. See Recommendation 2.5.3.1.j.
- e. Remove the table that was below "Total Countable Income".

Note: MAGI Budgets now only have a single Income Calculation Method Used per budget, not per person.
- f. Remove the Total Household Members table

Note: CalHEERS does not always provide the list of all the Household Members in the DER who belong in the budget so the table can be misleading if the number of people in the table differs from the Household Size.
- g. Move the following information to its own section, located below the "MAGI Household Budget Used" section.
 - i. "Federal Poverty Level:"
 - ii. "FPL% for Individual:"
 - iii. "MAGI Medi-Cal Eligible:"
 - iv. "Medi-Cal Access program (MCAP) Eligible:"
 - v. "Unmarried Pregnant Woman Under 21 Income Disregard Applies:"
 - vi. "Meets 435.603(f)(2)(i-iii) to Use Non-Tax Filer Household Composition for MAGI Medi-Cal:"
 - vii. "Meets 435.603(i) Exception to Use APTC Income/Deduction Calculations for MAGI Medi-Cal Determination:"
 - viii. "Meets 435.119(c): Adults Ineligible to the New Adult Group Due to Dependent Child Under Age 19 without Minimum Essential Coverage:"
 - ix. "Person Disability Indicator:"

- h. Add a new section named, “Reasonably Projected Annual Income (RPAI) After Deductions”.
 - i. The new section is located below the “Current Monthly Income (CMI)” section.
 - ii. The “Reasonably Projected Annual Income (RPAI) After Deductions” section displays the following information:
 1. “Total Monthly Amount:”
 - a. “Total Monthly Amount:” is bolded.
 - b. The “Total Monthly Amount:” displays information as outlined on the Table 1 below.
 2. “Total Annual Amount:”
 - a. Total Annual Amount:” is not bolded.
 - b. The “Total Annual Amount:” displays information as outlined on the Table 1 below.
 3. Left align the labels in this section and align with the labels in the below sections. Right align the amount in this section and align with amounts in the below sections.

Table 1: “Reasonably Projected Annual Income (RPAI) After Deductions”

Field	Description
Total Monthly Amount	<p>Display the value provided by CalHEERS in ‘Total Reasonably Projected Monthly Income Amount’. This value is saved in CH_BUDGET_DETL.RPMI_AMT.</p> <p>Bold the field label and the amount.</p>
Total Annual Amount	<p>Display the value for Total RPAI Amount. This value is saved in CH_BUDGET_DETL.RPAI_AMT.</p> <p>This amount displays a value if the value was provided by CalHEERS; otherwise, it displays as blank.</p> <p>CalHEERS will not send an RPAI Total Annual Amount unless the Income Calculation Method Used is RPAI.</p>

- i. Add a new section named, "System Calculated Annual Income (SCAI) After Deductions".
 - i. The new section is located below the "Reasonably Projected Annual Income (RPAI) After Deductions" section.
 - ii. The "System Calculated Annual Income (SCAI) After Deductions" section displays the following information:
 1. "Calendar Year:"
 - a. "Calendar Year:" is not bolded.
 - b. "Calendar Year:" displays information as outlined on Table 2 below.
 2. "Total Monthly Amount:"
 - a. "Total Monthly Amount:" is bolded.
 - b. "Total Monthly Amount:" displays information as outlined on Table 2 below.
 3. "Total Annual Amount:"
 - a. "Total Annual Amount:" is not bolded.
 - b. "Total Annual Amount:" displays information as outlined on Table 2 below.
 4. Left align the labels in this section and align with the labels in the below sections. Right align the amount/values in this section and align with amounts/values in the below sections.

Table 2: "System Calculated Annual Income (SCAI) After Deductions"

Field	Description
Calendar Year	<p>Display the value provided by CalHEERS in SCAI Calendar Year. This value is saved to CH_BUDGET_DETL.SCAI_CALNDR_YR.</p> <p>This field displays a value if the value was provided by CalHEERS; otherwise, it displays as blank.</p> <p>CalHEERS will not send an SCAI Calendar Year unless the Income Calculation Method Used is SCAI.</p>
Total Monthly Amount	<p>Display the value provided by CalHEERS in 'Total System Calculated Monthly Income Amount'. This value is saved in CH_BUDGET_DETL.SCAI_AMT.</p> <p>Bold the field label and the amount.</p>
Total Annual Amount	<p>Display the value provided by CalHEERS for Total SCAI Amount. This value is saved in CH_BUDGET_DETL.SCAI_AMT.</p> <p>This amount displays a value if the value was provided by CalHEERS; otherwise, it displays as blank.</p> <p>CalHEERS will not send an SCAI Total Annual Amount unless the Income Calculation Method Used is SCAI.</p>

- j. Add a new section named, "MAGI Household Budget Used".
 - i. The new section is located below the "System Calculated Annual Income (SCAI) After Deductions".
 - ii. The "MAGI Household Budget Used" section displays the following information:
 1. "Income Calculation Method Used:"
 - a. "Income Calculation Method Used:" is bolded.
 - b. "Income Calculation Method Used:" displays information as outlined on Table 3 below.
 2. "Total Household Members:"
 - a. "Total Household Members:" is bolded.
 - b. "Total Household Members:" displays information as outlined on Table 3 below.
 3. "Total Countable Income:"
 - a. "Total Countable Income:" is bolded.
 - b. "Total Countable Income:" displays information as outlined on Table 3 below.

Table 3: "MAGI Household Budget Used"

Field	Description
Income Calculation Method Used	<p>Display 'MAGI PAI (Historical)' if anyone has Income Calculation Method used 'PAI'; otherwise, display the first non-null value provided by CalHEERS in 'Income Calculation Method Used'. This value is saved in CH_BUDGET_HH.INC_METH_CODE.</p> <p>Possible values CMI, RPAI, SCAI, or MAGI PAI (Historical)</p> <p>Bold the field label and the value.</p> <p>Note: This field was not always populated by CalHEERS for historical MAGI Budgets, so the value can be blank.</p>
Total Household Members	<p>Display the value provided by CalHEERS in 'Total Household Members Size'. This value is saved in CH_BUDGET.DETL.HH_SIZE.</p> <p>Bold the field label and the value.</p>
Total Countable Income	<p>This field was moved from the Current Monthly Income (CMI) section (Rec 2.4.3.1.d.)</p> <p>Display the value provided by CalHEERS in 'Total Countable Income Amount'. This value is saved in CH_BUDGET_DETL.COUNT_INC_AMT.</p> <p>Bold the field label and the amount.</p>

2. Create a new Category Code Table for 'MAGI Income Budget Period Used'

CODE NUM IDENTIF	SHORT DECODE	LONG DECODE	CalHEERS Code
CMI	CMI	Current Monthly Income	CMI
RAI	RPAI	Reasonably Projected Annual Income	RAI
SAI	SCAI	System Calculated Annual Income	SAI
PAI	MAGI PAI (Historical)	MAGI Projected Annual Income (Historical)	

Note: Historical MAGI Budgets where PAI was used will be converted with recommendation 2.13.2.1

2.5.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Determination Hyperlink -> MAGI Determination Summary -> Name Hyperlink -> MAGI Determination Detail -> View Details Button

2.5.5 Security Updates

No Changes

2.5.6 Page Mapping

Update Page Mapping per the changes listed in Recs 2.5.3.1-2.

2.5.7 Accessibility

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

2.5.8 Page Usage/Data Volume Impacts

N/A

2.6 MAGI Person Detail

2.6.1 Overview

Update the MAGI Person Detail page to display the newly added and updated elements for the EDR and DER.

2.6.2 MAGI Person Detail Page Mockup

Additional Information		
Applying for Health Coverage: Yes	Full MC Determination Requested: No	Beneficiary Indicator:
DDSD Disability Indicator:	SSA Disability Indicator:	Deprivation: No
Military/Veteran: No	Spouse or Parent is Military/Veteran: No	Full Time Student: No
Third Party Liability: No		

Figure 2.6.2.1 – MAGI Person Detail Page Additional Information Section with the new Beneficiary Indicator

Verification Type
SSN
SSN Waiver
Applied for SSN
US Citizenship
Immigration Status
Lawful Presence
Qualified Non-Citizen
Five Year Bar Exempt/Met
PRUCOL
PRUCOL - INS Ack
MAGI Income
Projected Annual Income (Exchange Only)

Figure 2.6.2.2 MAGI Person Detail Page Verification Type of the EDR and DER

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
Salary, Wages		\$1,200.00		Monthly	11/01/2024-	
Social Security Retirement	Jolly	\$14.00		Monthly	11/01/2024-	
Self Employment	Painters are us	\$142.00		Monthly	12/01/2024-	
Caregiver Wages - Other (Lives w/ Recipient)	IHSS	\$150.00		Monthly	01/01/2025-	

Figure 2.6.2.4 MAGI Person Detail Page 'IHSS Indicator sent as 'Yes' under the 'Income' section

Source	Employer	Amount	Hire Date	Frequency	Begin Date - End Date	RDP Shared
Salary, Wages		\$1,200.00		Monthly	11/01/2024-	
Social Security Retirement	Jolly	\$14.00		Monthly	11/01/2024-	
Self Employment	Painters are us	\$142.00		Monthly	12/01/2024-	
Caregiver Wages - Other (Does not live w/ Recipient)	IHSS	\$150.00		Monthly	01/01/2025-	

Figure 2.6.2.5 MAGI Person Detail Page – 'IHSS' Indicator sent as 'No' under the 'Income' section

Income	
Projected Annual Income	(Exchange Only)
Projected Annual Amount: \$	

Figure 2.6.2.6 MAGI Person Detail Page – Addition of 'Exchange Only' to the Projected Annual Income title under the 'Income' Section

Medi-Cal Reasonable Explanation			
Reason	Status	Verification Type	Reasonable Explanation
Other	Confirmed	Current Monthly Income (CMI),	MAGI PAI (Historical)

Figure 2.6.2.7 MAGI Person Detail Page – Updated Medi-Cal Reasonable Explanation section showcasing MAGI PAI (Historical) for historical records under the 'Income' Section

2.6.3 Description of Changes

1. Update the 'Additional Information' section of the MAGI Person Detail Page as below.
 - a. Add a field named, "Beneficiary Indicator" to the right of 'Full MC Determination Requested'.
 - i. Display the value sent in the 'beneficiaryInd' element on the EDR based on the recommendation from 2.12.2.6 below.
 1. Possible Values
 - a. Blank
 - b. Yes
 - b. Move the 'Third Party Liability' field below the 'Military/Veteran' field as shown in Figure 2.6.2.1.
2. Update the 'Income' section of the MAGI Person Detail page to add the text (Exchange Only) after the title 'Projected Annual Income' as shown in Figure 2.6.2.6.
3. Update the 'Income' section of the MAGI Person Detail page to display when an individual lives with the In-Home Supportive Services (IHSS) Recipient when the 'Caregiver Wages -Other' Income type is sent in an EDR or received in a DER as follows:
 - a. When the 'Resides with client IHSS Indicator' = Yes, append "(Lives w/Recipient)" to the income Source 'Caregiver Wages-Other' as shown in Figure 2.6.2.4.
 - b. When the 'Resides with client IHSS Indicator' = 'No', append "(Does not live w/Recipient)" to the income Source 'Caregiver Wages – Other' as shown in Figure 2.6.2.5.
 - c. When the 'Resides with client IHSS Indicator' is null, do not append anything to the income Source 'Caregiver Wages-Other'.

Technical Note: In-Home Supportive Services (IH) income type is added to eHIT in recommendation 2.12.2.1. 'Resides with client IHSS Indicator' is stored in ICT_PERS_INC.LIVES_WITH_RECIP_IND.

4. Update CalHEERS Verification Code (CT_10590) for Income as follows:

CODE_NUM_IDENTIF	SHORT_DECODE	LONG_DECODE	BEG_DATE	END_DATE
CI	MAGI Current Monthly Income	MAGI Current Monthly Income	01/01/1000	09/21/2025
PI	MAGI Projected Annual Income	MAGI Projected Annual Income	01/01/1000	09/21/2025
CI	MAGI Income	MAGI Income	09/22/2025	
PI	Projected Annual Income (Exchange Only)	Projected Annual Income (Exchange Only)	09/22/2025	

5. Update the MAGI Person Detail page for both EDRs and DERs to display the Verification Type decode dynamically based on Begin and End Date as shown in Figure 2.6.2.2 as follows:
 - a. When viewing a DER, use the Initiated Date of the DER as the effective date of the decode.
 - b. When viewing an EDR, use the 'Ready for Transfer' status date of the EDR as the effective date of the decode. If there is no 'Ready for Transfer' status because the EDR is Pending, then use the 'Pending' status of the EDR as the effective date of the decode.
6. Update MC Reasonable Explanation Verification Type (CT_10841) Short Decode for Project Annual Income as follows:

CODE_NUM_ID ENTIF	OLD SHORT_DECODE_ NAME (visible to Users in CalSAWS)	NEW SHORT_DECODE_ NAME	NEW LONG_DECODE_ NAME (not visible to users in CalSAWS)
PI	Projected Annual Income (PAI)	MAGI PAI (Historical)	MAGI Projected Annual Income (Historical)

Note: No data conversion is required for the REX historical MAGI PAI. The page will display the MAGI PAI (Historical) when a user views an older EDR or DER based on the new decode as shown in Figure 2.6.2.7.

2.6.4 Page Location

To view MAGI Person Detail in an EDR

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Determination Hyperlink -> MAGI Determination Summary -> Request ID Hyperlink -> MAGI Request Summary -> Person Name Hyperlink
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Request MAGI button -> MAGI Request Summary -> Person Name Hyperlink
- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** MAGI Eligibility -> MAGI Determination List -> Request Hyperlink -> MAGI Request Summary -> Person Name Hyperlink
- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary -> Initiated Date Hyperlink -> MAGI Referral Detail -> Request Hyperlink -> MAGI Request Summary -> Person Name Hyperlink

To view MAGI Person Detail in a DER

- **Global:** Eligibility
- **Local:** Case Summary
- **Task:** IAT Summary-> Initiated Date Hyperlink -> MAGI Referral Detail -> Person Name Hyperlink

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update Page Mapping per recommendations in Description of changes section.

2.6.7 Accessibility

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

2.6.8 Page Usage/Data Volume Impacts

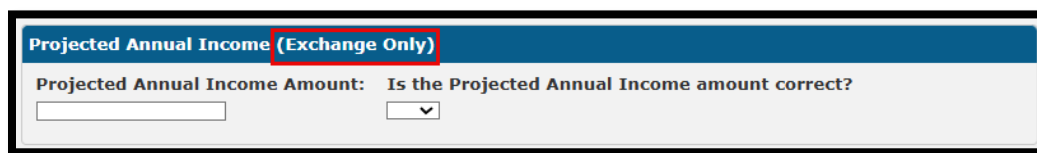
N/A

2.7 Tax Household Detail Page

2.7.1 Overview

Update the 'Tax Household Detail' page 'Projected Annual Income' section label to also indicate it is for Exchange only.

2.7.2 Tax Household Detail Mockup



The mockup shows a blue header bar with the text 'Projected Annual Income (Exchange Only)'. Below this is a light gray section with two labels: 'Projected Annual Income Amount:' followed by a text input field, and 'Is the Projected Annual Income amount correct?' followed by a dropdown menu with a downward arrow.

Figure 2.7.2.1 – Tax Household Detail Page – Projected Annual Income (Exchange Only)

2.7.3 Description of Changes

1. Rename the 'Projected Annual Income' section label to 'Projected Annual Income (Exchange Only)'.

2.7.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Financial-> Tax Household

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

N/A

2.7.7 Accessibility

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

2.7.8 Page Usage/Data Volume Impacts

N/A

2.8 Medi-Cal Reasonable Explanation Detail

2.8.1 Overview

Update the 'Medi-Cal Reasonable Explanation Detail' page to no longer display the 'Verification Type'.

2.8.2 Medi-Cal Reasonable Explanation Detail Mockup

Medi-Cal Reasonable Explanation Detail

* - Indicates required fields

Name: * Fillerman, Jackson 24M **Type: *** Income

Reason: * Other **Status: *** Confirmed

Begin Month: * 01/2025 **End Month: ***

Description:
Changed tax filing status from dependent to single.

Last Updated On 08/16/2025 12:23:49 PM By: [1002608](#)

This Type 1 page took 0.62 seconds to load.

Figure 2.8.2.1 – Medi-Cal Reasonable Explanation Detail Page with 'Verification Type' removed

2.8.3 Description of Changes

1. Update the Medi-Cal Reasonable Explanation Detail page to remove the 'Verification Type' field and values.

2.8.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Options
- **Task:** Medi-Cal Reasonable Explanation ->Medi-Cal Reasonable Explanation List ->Medi-Cal Reasonable Explanation Detail

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

Update Page Mapping per the recommendation 2.8.3.1.

2.8.7 Accessibility

Accessibility was assessed for the Income Detail page and no changes are needed on the page.

2.8.8 Page Usage/Data Volume Impacts

N/A

2.9 SCAI Re-evaluation Batch MAGI Sweep

2.9.1 Overview

Create a new 'SCAI Re-evaluation' Batch MAGI Sweep job to identify individuals who are eligible on MAGI Medi-Cal due to the SCAI MAGI Medi-Cal Budget Methodology for reevaluation in January of the following year.

2.9.2 Description of Change

1. Add a Batch EDR Run Reason Code for SCAI Re-evaluation EDR Sweep (CT_2813)

Code	Short Description	Long Description	Reporting Indicator
TBD	SCAI Re-evaluation	System Calculated Annual Income Re-evaluation Eligibility Determination Request	Yes

Note: The following reports include Batch EDR Run Reason:

- a. Outstanding Eligibility Determination Request Report
 - b. E-HIT Exception Report No Response from CalHEERS
 - c. E-HIT Exception Report Error Message Received from CalHEERS
 - d. E-HIT Exception Report MAGI Ineligibles from CalHEERS Need Case Authorization
 - e. MAGI Error Report
 - f. Batch MAGI Skip Report
 - g. MAGI Discontinuance Report
2. Create a new Batch MAGI SCAI Re-evaluation Sweep job to identify Medi-Cal individual(s) who are eligible for MAGI based on the 'SCAI' MAGI Medi-Cal Budget Methodology for reevaluation in January of the next year.
 - a. Identify the target population that meets all the following conditions:
 - i. At least one Medi-Cal individual is Active MEM on a MAGI Medi-Cal aid code in the come-up month
 - ii. The Valid DER has at least one individual with 'Income Calculation Method Used' = SCAI (CH_BUDGET_HH.INCOME_CALC_USED_CODE = SAI)
 - iii. The Medi-Cal Renewal Due date is February of the following year or later.

- b. Insert a record into the MAGI staging table (CH_TRANSACTION) for the individuals for EDR processing for January of the following year (come-up month) as follows:
 - i. **Transact Code:** 'ED'
 - ii. **Program:** Set the program to the Medi-Cal program assigned to the most recent EDR. If there is no prior EDR, then assign the Medi-Cal program for the EDR based on the Medi-Cal program assigned to the most recent DER.
 - iii. **Effective Date:** January of following year
 - iv. **Run Reason Code:** 'CO'
 - v. **Batch Indicator:** 'Y'
 - vi. **Batch Reason Code:** set to the new Batch Run Reason code from Recommendation 2.9.2.1.

Note: The Batch MAGI processing jobs will run after this sweep and send EDRs for the identified programs to CalHEERS.

2.9.3 Execution Frequency

Annually, 9 calendar days prior to the last day of November. The first time this job runs is: November 21, 2025. For future years, if November 21 calendar day falls on a holiday or Sunday, the job will run the following business day.

2.9.4 Key Scheduling Dependencies

Run prior to the Batch MAGI processing jobs (PB00CH100) and after Batch EDBC processing job (PB00E103).

2.9.5 Counties Impacted

All Counties

2.9.6 Category

Core

2.9.7 Data Volume/Performance

Volume estimates cannot be determined because the SCAI data points do not yet exist in CalSAWS. SCAI budgeting methodology is new to the CalHEERS Business Rules Engine with the 25.09 release so only MAGI Determinations post 25.09 release will have SCAI data points.

2.9.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failure 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....)

2.10 SCAI Re-evaluation Batch EDBC Sweep Job

2.10.1 Overview

Create a new 'SCAI Re-evaluation Batch EDBC Sweep' job to process EDBC for programs where the 'SCAI Re-evaluation' DER returned.

2.10.2 Description of Change

1. Add a batch Eligibility Sweep code for the re-evaluation of an SCAI Re-evaluation individual (CT_942)

Short Decode	Long Decode
MAGI Medi-Cal individual annual re-evaluation due to SCAI budget Methodology	MAGI Medi-Cal individual annual re-evaluation due to System Calculated Annual Income Budget Methodology used for MAGI determination.

This will allow CalSAWS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.10.2.2

Journal Category: Eligibility

Journal Type: Batch EDBC

Short Description: Batch EDBC ran for XX/XXXX

Long Description: Batch EDBC ran for XX/XXXX. Batch EDBC processed for the Medi-Cal program for the following reason: MAGI Medi-Cal individual annual re-evaluation due to SCAI budget Methodology

2. Create a new Batch EDBC Sweep job to identify Medi-Cal programs for Batch EDBC processing where a DER was received based on an EDR initiated by 'SCAI Re-evaluation' Batch MAGI sweep that meets the following criteria:
 - a. Identify the population for which to run Batch EDBC.
 - i. A DER for benefit month January of next year was received from the EDR initiated by the 'SCAI Re-evaluation' process and the DER status is 'Reviewed'.
 - ii. At least one individual on the Medi-Cal program is an Active MEM effective for January of next year.
 - iii. The DER was received between the last success date and batch date.
 - b. Insert a Batch EDBC Staging record (SYS_TRANSACTION) for the Medi-Cal program identified above to be processed by Batch EDBC as follows:
 - i. Effective Date = January of following year
 - ii. Type Code = 'BE'
 - iii. Sub Type Code = set to the code value from Recommendation 2.10.2.1
 - iv. Program = set to the program for the identified individual. This does not always match the program ID from the EDR/DER.
 - v. Run Reason Code = 'RE'
 - vi. Run Type Code = Single Program Mode

Note: The Batch EDBC processing jobs will run the day after this sweep and run EDBC for the identified programs to authorize the results.

2.10.3 Execution Frequency

Daily (Monday-Saturday), 8 calendar days prior to the last day of November until and including Batch 10-day cut-off in December.

The first time this job runs is: Daily, beginning on November 22, 2025, through and including December 18, 2025, excluding Sundays and Batch Holidays.

For future years, if November 22 calendar day falls on a holiday, Sunday or Monday, the job will begin the following business day, because it must run at least one day after the SCAI Re-evaluation Batch MAGI Sweep.

2.10.4 Key Scheduling Dependencies

Run after Batch EDBC processing job (PB00E103). Run at least one day after the SCAI Re-evaluation Batch MAGI Sweep from Rec 2.9

2.10.5 Counties Impacted

All Counties

2.10.6 Category

Core

2.10.7 Data Volume/Performance

Volume estimates cannot be determined because the SCAI data points do not yet exist in CalSAWS. SCAI budgeting methodology is new to the CalHEERS Business Rules Engine with the 25.09 release so only MAGI Determinations post 25.09 release will have SCAI data points.

2.10.8 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.)

2.11 Batch EDBC Skips

2.11.1 Overview

Add new batch EDBC skip reasons to skip Medi-Cal programs from processing EDBC when the DER from 'SCAI Re-evaluation' has income verification pending, or an Active Medi-Cal Member is losing MAGI coverage, or any Member is on aid code 7J without Full Medi-Cal Hierarchy set to Yes.

2.11.2 Description of Change

Note: The new skip reasons will display on the 'Batch Eligibility Report' and CalSAWS creates a task for the automated action, "Batch EDBC MAGI Medi-Cal Skipped: Review Reason." if the county has the task activated.

1. Add a new Not Processed Reason (CT_707) code to skip Medi-Cal programs from Batch EDBC processing when an Active Member has income verification in a 'Pending' status in the 'SCAI Re-evaluation' DER.

Code Num Identif	Short Decode Name	Long Decode Name
TBD	MAGI individual has pending MAGI income verif on SCAI Re-evaluation DER	Active Member on Medi-Cal program returned in the System Calculated Annual Income Re-evaluation DER has MAGI income verification in a 'Pending' status.

2. Update the Batch EDBC skip logic to skip Medi-Cal programs with the 'Not Processed Reason' mentioned in 2.11.2.1 when the below are true:
 - a. EDBC was initiated from the 'SCAI Re-evaluation Batch EDBC Sweep' job.
 - b. Any Active MEM on the Medi-Cal program for January of next year is MAGI Eligible or Conditionally Eligible on the DER associated to the SCAI EDR, and that individual has MAGI Income Pending verification on the DER. The Pending MAGI Income (INC) verification could be for e-Verification, Admin Verification or both.
3. Add a new Not Processed Reason (CT_707) code to skip the Medi-Cal program from EDBC processing when an Active MAGI Member's eligibility is losing MAGI coverage on the 'SCAI Re-evaluation' DER.

Code Num Identif	Short Decode Name	Long Decode Name
TBD	MAGI individual no longer eligible for MAGI on SCAI Re-evaluation DER	Active MAGI Member on Medi-Cal program returned in the System Calculated Annual Income Re-evaluation DER as no longer eligible to MAGI.

4. Update the Batch EDBC skip logic to skip a Medi-Cal program with 'Not Processed Reason' mentioned in 2.11.2.3 when the following are true:
 - a. EDBC was initiated from the 'SCAI Re-evaluation Batch Sweep' job.
 - b. Any Active Member on the Medi-Cal program on a MAGI aid code returned as MAGI Discontinued or MAGI Ineligible on the SCAI DER for January of next year.
5. Add a new Not Processed Reason (CT_707) code to skip the Medi-Cal program from EDBC processing when an Active Member on aid code 7J does not have Full Medi-Cal Hierarchy = Yes.

Code Num Identif	Short Decode Name	Long Decode Name
TBD	Medi-Cal person on 7J aid code	Medi-Cal person on 7J aid code

6. Update the Batch EDBC skip logic to skip a Medi-Cal program with 'Not Processed Reason' mentioned in 2.11.2.5 when the following are true:
 - a. Any Active Member on the Medi-Cal program on aid code 7J does not have a Customer Option for 'Full Medi-Cal Hierarchy' = Yes for the Batch EDBC benefit month.

Note: This skip is not specific to the SCAI re-evaluation process and applies to all Batch EDBCs for Medi-Cal. Future SCR CA-229417 (Revised MC Hierarchy Phase II) has a request to update the Medi-Cal rules themselves for 7J. During design for that SCR, this skip will be evaluated to determine if it needs to be updated or removed accordingly.

2.11.3 Execution Frequency

N/A

2.11.4 Key Scheduling Dependencies

N/A

2.11.5 Counties Impacted

All Counties

2.11.6 Data Volume/Performance

No measurable amount of data volume or performance change

2.11.7 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.)

2.12 eHIT

2.12.1 Overview

Update eHIT logic to receive and display additional MAGI Budget information from CalHEERS. Update eHIT logic to communicate IHSS income type and Lives with Recipient Indicator. Update eHIT outbound logic to communicate Beneficiary Indicator when an individual is transitioning from cash-based or Non-MAGI Medi-Cal to MAGI, and they are evaluated by CalHEERS for the first time. Update eHIT to default 'CMI' Verification Type for Reasonable Explanation.

2.12.2 Description of Change

1. Update Income Type 'Caregiver Wages -Other' (CT186_C5) to map to CalHEERS as 'IH' for both inbound (REFER_TABLE_15_DESCR) and outbound (REFER_TABLE_14_DESCR).
Technical Note: Current eHIT mapping logic has conditional criteria for Caregiver Wages-Other depending on if the 'MAGI Medi-Cal: Lives with IHSS Recipient' is checked or not. The conditional criteria is no longer required since the 'residesWithClientIHSSInd' is added to eHIT; if the Income Type is 'Caregiver Wages-Other', map to CalHEERS inbound and outbound 'IH'.
2. Update eHIT inbound logic to consume and save 'residesWithClientIHSSInd' from the DER.
3. Update eHIT outbound logic to send 'residesWithClientIHSSInd' as follows:
 - a. Send 'residesWithClientIHSSInd' = 'Yes', when the 'MAGI Medi-Cal: Lives with IHSS Recipient' is checked on the Income detail page and the income type is 'Caregiver Wages – Other'.
 - b. Send 'residesWithClientIHSSInd' = 'No', when the 'MAGI Medi-Cal: Lives with IHSS Recipient' is not checked on the Income Detail page and the income type is 'Caregiver Wages – Other'.

4. Add the following new Eligibility Evaluation Reasons (CT_466)

CODE_NUM_IDENTIF	SHORT_DECODE_NAME (visible to Users in CalSAWS)	LONG_DECODE_NAME (not visible to users in CalSAWS)
RU	Reasonably Projected Annual Income Used	Reasonably Projected Annual Income was used for this determination
SU	System Calculated Annual Income Used	System Calculated Annual Income was used in this determination
FR	MAGI Medi-Cal Reasonably Projected Annual Income – Admin Verification Failed	The MAGI Medi-Cal Reasonably Projected Annual Income verification was administratively failed
FC	MAGI Medi-Cal System Calculated Annual Income – Admin Verification Failed	The MAGI Medi-Cal System Calculated Annual Income Verification was administratively failed.

- End date the existing Eligibility Evaluation Reason decodes (CT_466) and insert new decodes for 'PF' and 'NV' as follows:

CODE_NUM_I DENTIF	SHORT_DECODE E_NAME (visible to Users in CalSAWS)	LONG_DECODE DE_NAME (not visible to users in CalSAWS)	BEG_DATE	END_DATE
PF	MAGI Medi-Cal Projected Annual Income - Admin Verification Failed	The MAGI Medi-Cal Projected Annual Income verification was administratively failed	01/01/1000	09/21/2025
NV	Current Monthly Income And Projected Annual Income Verification Needed	Current Monthly Income And Projected Annual Income Verification Needed	01/01/1000	09/21/2025
PF	Subsidy PAI, CA Subsidy PAI – Admin Verification Failed	The Projected Annual Income Verification for an Exchange consumer is administratively failed	09/22/2025	
NV	Income Verification Needed	Income Verification Needed	09/22/2025	

Note: The Eligibility Evaluation Reasons codes (EERC) display on the MAGI Determination Summary, MAGI Determination Detail and MAGI Referral Detail pages in CalSAWS. The EERCs will display the decode based on when the page is accessed and not based on what the historical text was when the DER was received for these EERCs with text updates. To update the pages to be dynamic based on the text when the DER was received is out of scope for this change and will be changed with future SCR CA-291047.

6. Update eHIT outbound logic to populate the 'BeneficiaryInd' = 'Yes' on the EDR when the following conditions are met:

- a. **Individual is receiving Medi-Cal or Cash-Based Medi-Cal in EDR benefit month**

- i. The EDR benefit month is not a Retro Medi-Cal month

- AND either of the following:**

1. Individual is Active MEM on a Medi-Cal program, in any county, in the EDR benefit month. Exclude Active MEMs that are only on the following programs based on aid code.

Medi-Cal Program	Aid Code(s)
Minor Consent	7M, 7N, 7P, 7R
CMSP	50, 85, 88, 89
MSP	80, 8A, 8C, 8D
TPN	73
Dialysis	71
TB	7H

An individual can be on some other Medi-Cal aid code in conjunction with the excluded aid code and they are considered a beneficiary based on the other Medi-Cal aid code. Example: M1 and 80

Note: A case with Minor Consent should never be on the same case that is sent to CalHEERS for a MAGI Determination. Minor Consent is listed as a precaution, but not likely a realistic scenario.

OR

2. Individual is Active MEM on a cash-based Medi-Cal EDBC program, in any county, in the EDR benefit month. Cash-based Medi-Cal EDBC programs include: CalWORKS, Foster Care, KinGap, AAP, RCA

OR

3. Individual has an OPA record for either Medi-Cal or cash-based Medi-Cal program effective at least one day in the EDR benefit month.
 - a. If the OPA for the Medi-Cal program specifies an aid code, exclude if the aid code is listed in 2.12.6.a.i.1 AND also exclude Covered California aid codes (any that begin with 'X'). If the OPA for Medi-Cal program does not specify an aid code, there is no exclusion.
 - b. OPA cash-based Medi-Cal includes: CalWORKS, Foster Care, KinGap, AAP, RCA, SSI Only, SSI/SSP, SSP Only

b. Individual is transitioning from other Medi-Cal or cash-based Medi-Cal in the month prior to EDR benefit month

- i. Individual is Pending on the Medi-Cal program in the same case for the EDR benefit month

AND

The Individual's current application date is prior to the EDR benefit month

AND either of the following:

1. Individual was an Active MEM for Medi-Cal or cash-based Medi-Cal EDBC program, in any county, in the prior month. Exclude Active MEMs that are only on Minor Consent, CMSP, MSP, TPN, Dialysis, TB based on aid code. (see 2.12.6.a.i.1)

OR

2. Individual has an OPA record for either Medi-Cal or cash-based Medi-Cal program effective at least one day in the month prior to EDR benefit month.
- a. If the OPA for the Medi-Cal program specifies an aid code, exclude if the aid code is listed in 2.12.6.a.i.1 AND also exclude Covered California aid codes (any that begin with 'X'). If the OPA for Medi-Cal program does not specify an aid code, there is no exclusion.
- b. OPA cash-based Medi-Cal includes: CalWORKS, Foster Care, KinGap, AAP, RCA, SSI Only, SSI/SSP, SSP Only

Examples

- A. Individual is discontinued from CalWORKs effective 10/1/2025 and auto-tests into Medi-Cal aid code 38.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be 'Y' because the individual is an Active MEM in MC for 10/2025.

- B. Individual is discontinued from CalWORKs effective 10/01/2025 and auto-tests into a Pending Medi-Cal program. They are not yet granted a Medi-Cal aid code.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be 'Y' because the individual is Pending in Medi-Cal in 10/2025, the application date is copied from the CalWORKs program and it is prior to 10/2025, and they were an Active MEM in CalWORKs in 09/2025.

- C. Individual was on SSI/SSP and SSI/SSP ends 8/31/2025. Individual is put on Craig v Bonta eff 09/01/2025. Individual is Pending on a new MC program with Application Date 09/01/2025 with BDA of 10/2025.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be sent as 'Y' because the individual is Pending on the Medi-Cal program for 10/2025, the application date is prior to 10/2025, and OPA

for the Medi-Cal Program with Craig v Bonta aid code 6E is effective for at least one day in the prior month of 09/2025.

D. Individual is a new applicant to Medi-Cal with app date 10/02/2025.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will not be sent because the individual is Pending and the application date is not prior to the EDR benefit month. The individual is not an Active MEM on MC nor cash-based MC in 10/2025 or 09/2025, and there are no OPA records effective in 09/2025 or 10/2025.

E. Individual is an Active MEM on CMSP in 09/2025 and reports a change in income.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will not be sent because the Individual is an Active MEM on an excluded aid code for 10/2025, there are no cash-based Medi-Cal or OPA records effective 10/2025.

F. Individual is discontinued from Medi-Cal program effective 10/01/2025. The discontinuance is rescinded and the person is Pending on the Medi-Cal program.

EDR is sent for 10/2025 to determine MAGI. The Beneficiary Indicator will be sent = 'Y' because the individual is Pending on the Medi-Cal program, the application date is in the past and the individual was an Active MEM on Medi-Cal in 09/2025.

7. Update eHIT outbound logic to default populating the 'rexVerifType' = 'CMI' when there is a Medi-Cal Reasonable Explanation Detail record in the EDR.
8. Add the below CalHEERS Verification Response Descriptions (CT_10764).

CODE_NUM_IDENTIF	SHORT_DECODE_NAME	LONG_DECODE_NAME
40	Admin has confirmed income is not verified	Admin has confirmed income is not verified
41	Admin has confirmed income is verified	Admin has confirmed income is verified
42	Income is reasonably compatible	Income is reasonably compatible
43	Income is not reasonably compatible	Income is not reasonably compatible

Note: The text will display on the eHIT Response hover-over on MAGI Person Detail page for a DER.

PRUCOL				eHit Response Income is not reasonably compatible
PRUCOL - INS Ack				
MAGI Income	No	1500.00	Pending	

9. Update eHIT inbound logic to save the value in 'totalRPAISCAIAmount' to CH_BUDGET_DETL.RPAI_AMT when 'incomeCalculationMethodUsed'= RAI or save 'totalRPAISCAIAmount' to CH_BUDGET_DETL.SCAI_AMT' when incomeCalculationMethodUsed'= SAI.
10. End date the Income Proof Required code table (CT_494) for 'CM' and add new decode as follows:

CODE_NUM_I DENTIF	SHORT_DECODE E_NAME (visible to Users in CalSAWS)	LONG_DECODE DE_NAME (not visible to users in CalSAWS)	BEG_DATE	END_DATE
CM	Current Monthly Income Verification required	Current Monthly Income Verification required	01/01/1000	09/21/2025
CM	MAGI Medi- Cal Income Verification required	MAGI Medi- Cal Income Verification required	09/22/2025	

Note: The Income Proof Required decode displays on the MAGI Determination Detail page in CalSAWS. The page will display the decode based on when the page is accessed and not based on what the historical text was when the DER was received. To update the page to be dynamic based on the text when the DER was received is out of scope for this change and will be changed with future SCR CA-291047.

2.12.3 Interface Partner

CalHEERS

2.12.4 eHIT Schema Version

Version 23

2.13 Data Change

2.13.1 Overview

Run a one-time data change to convert the existing values for 'PAI/CMI used' in the historical MAGI Budget to the new field for 'Income Calculation Methodology Used'.

2.13.2 Description of Change

1. Convert the existing 'PAI_USED_IND' in CH_BUDGET_HH to a new column 'INCOME_CALC_USED_CODE'.
The new column is not required, and Null values can exist.
 - a. PAI_USED_IND = 'Y' converts to INCOME_CALC_USED_CODE = 'PAI'
 - b. PAI_USED_IND = 'N' converts to INCOME_CALC_USED_CODE = 'CMI'
 - c. PAI_USED_IND = Null converts to INCOME_CALC_USED_CODE = Null

2.13.3 Estimated Number of Records Impacted/Performance

Approx. 1 billion records

2.14 Automated Regression Test

2.14.1 Overview

Create automated regression test scripts to verify that the Income Amount Detail, Expense Amount Detail and Expense Contributors Detail pages can be saved with Begin Date and End Date values more than 5 months in the future.

2.14.2 Description of Change

1. Create regression scripts to verify that the Income Amount Detail page can be saved with Begin Date and End Date values more than 5 months in the future.
2. Create regression scripts to verify that the Expense Amount Detail page can be saved with Begin Date and End Date values more than 5 months in the future.
3. Create regression scripts to verify that the Expense Contributors Detail page can be saved with Begin Date and End Date values more than 5 months in the future.

CalSAWS

California Statewide Automated Welfare System



CA-222722 ACL 14-98-Add M40-105C- Immunization NOA

[03/25/2025]

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Owner	
	Preparer	Sujit Neupane
	Reviewer	Tiffany Huckaby
	Approver	
APPROVAL DATE	APPROVED VERSION	REVIEWED AND APPROVED BY

Table of Contents

Contents

1	OVERVIEW	3
1.1	Current Design	3
1.2	Requests	3
1.3	Overview of Recommendations	3
1.4	Assumptions.....	3
2	RECOMMENDATIONS	4
2.1	Add a new NOA reason for M40-105C when immunization proof is not provided.....	4
2.1.1	Overview	4
2.1.2	Form/NOA Verbiage.....	4
2.1.3	Form/NOA Variable Population	5
2.1.4	Form/NOA Generation Conditions	6
2.2	Update form CW 2209 to generate with M40-105C and/or M40-181E	7
2.2.1	Overview.....	7
2.2.2	Form/NOA Verbiage.....	7
2.2.3	Form/NOA Variable Population	7
2.2.4	Form/NOA Generation Condition	8
2.3	Update M40-181E to only trigger at Redetermination.....	8
2.3.1	Overview.....	8
2.3.2	Form/NOA Verbiage.....	9
2.3.3	Form/NOA Variable Population	9
2.3.4	Form/NOA Generation Conditions	9
1.	Updates to Fragment Generation	9
3	SUPPORTING DOCUMENTS	9

CA-222722 ACL 14-98-Add M40-105C-Immunization and M40-105E-School Attendance NOAs

1 OVERVIEW

Add a new NOA reason for M40-105C and automate via EDBC. M40-105C & M40-181E will be auto generated with the form CW 2209-'Immunization Good Cause Request' per ACL 14-98. M40-181E will only be used during redetermination.

1.1 Current Design

The system currently uses M40-181E -SAWS 2 Plus Redetermination Immunization/School for penalizing the applicant/payee on a case when failed to provide immunization or school verification. The M40-181E NOA is only to be used during redetermination, it does not replace the M40-105C nor M40-105E.

1.2 Requests

Add a new NOA reason for M40-105C and automate via EDBC. M40-105C & M40-181E should auto generate with the form CW 2209-'Immunization Good Cause Request' per ACL 14-98. M40-181E should only be used during redetermination.

1.3 Overview of Recommendations

- Auto generate M40-105C-Notice of Action-Immunization
- Generate CW 2209-Immunization Good Cause form with M40-105C and M40-181E
- Update the trigger condition for M40-181E to only trigger at Redetermination

1.4 Assumptions

- NOA reason for M40-105C will be added in English and Spanish only
- M40-105C (11/14) is already available in Template repository
- M40-105E (02/15) was added to the template repository and Chronic Truant reason was automated via EDBC with CA-255247
- SCR CA-237846 updated the NOA M40-181E to 11/2014 version
- CW 2209 will generate only when M40-181E is generated for 'FTP Immunization'
- SCR CA-291890 will automate M40-105C – Immunization NOA in Threshold languages

2 RECOMMENDATIONS

2.1 Add a new NOA reason for M40-105C when immunization proof is not provided

2.1.1 Overview

A new NOA reason is being added for M40-105C when immunization proof is not provided.

State Form/NOA: M40-105C (11/14)

NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Program(s): CalWORKs

Action Type(s): Change

Fragment Level: Program

Repeatable: No, generates once on the NOA with all the applicable children's names listed

Include NA Back 9: Yes

- **Includes standard NA Back 9 variable population:** Yes

Forms/NOAs Generated with this NOA: CW 2209

Languages: English, Spanish

2.1.2 Form/NOA Verbiage

Create Fragment XDP

Create a new XDP for this reason fragment.

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting*
Static	<p>On, <IMMUNIZATION_PROOF_NOTIFY_DATE>, we asked you to give us the proof of immunizations (shots or vaccines) for all of the children under the age of six in your assistance unit.</p> <p>You did not give us the proof of up-to-date immunizations for <CHILD_NAME> who is/are under the age of six in your assistance unit and you did not ask the County for help getting this proof.</p> <p>The needs of <PARENT(S)_OR_CARETAKER> were not counted in figuring the amount of your cash aid because you have not shown us proof or the proof you gave us showed immunizations are not current.</p> <p>REMEMBER: You do not have to immunize your child if any of these good cause reasons apply to you:</p> <ul style="list-style-type: none">• You do not believe in immunizing your children;• You have a medical statement saying that your children should not be immunized;	Arial 10

	<ul style="list-style-type: none"> You had no transportation or had transportation problems getting to a doctor who would immunize your children; You could not get an appointment to get the immunizations, or the immunization your children needed was not available; The doctor does not speak your language or there was another language access problem; You or the children were sick and could not go to the doctor; The records do not correctly show all the immunizations your children got and you are trying to correct the records; or You have other good reasons for not showing your children are up-to-date with their immunizations. You must explain your reason and show us proof. <p>Your cash aid may go back up by giving the county proof of immunization. Your cash aid may also go back up if you do not believe in immunization, have good cause, the child has special medical needs, and/or the immunization shot was not available. Your cash aid will go back up the 1st of the month following the month after we get this proof.</p>	
--	--	--

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

2.1.3 Form/NOA Variable Population

1. Add Fragment Variable Population

There are two variable populations in the new M40-105C reason.

Variable Name	Population	Formatting*
<IMMUNIZATION_PROOF_NOTIFY_DATE>	<p>Populates with the notification date when the immunization proof was asked for.</p> <p>Format: "MM/DD/YYYY"</p> <p>*Note: The date the form CW 2200 (Request for Verification) was sent to the primary applicant</p>	Arial 10
<CHILD_NAME>	Populates with the child or children's names with	Arial 10

	unverified immunization records. Ex: "John Doe" for a single child. Ex2: "John Doe, Jane Doe" for multiple children.	
<PARENT(S)_OR_CARETAKER>	Populates with the name of the parent(s)/caretaker relatives with role reason of 'FTP Immunization'. Ex: "John Doe" for a single parent. Ex2: "John Doe, Jane Doe" for 2 parents.	

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

Variables Requiring Translations: N/A

2. Add Fragment Regulations

Add the following regulations when this new fragment reason generates on the NOA: 40-105.4, W & IC 11265.8

3. Add NOA Title and Footer Reference for new Reason

NOA Reference on Document List Page: FTP Immunization

NOA Title: CW_CH_NOA_TYPE (Snippet ID: 3108)

NOA Title Requires Translations: No. Spanish is already available.

NOA Footer: M40-105C (11/14)

NOA Footer Requires Translations: No

2.1.4 Form/NOA Generation Conditions

1. Add Fragment Generation

Generate this new reason fragment on a NOA when all the following is true:

- The program is CalWORKs.
 - The program in the newly run EDBC is active.
 - There is at least one person with the role reason of 'FTP Immunization' (CT73_CE) on the newly run EDBC.
 - There is at least one previously existing CalWORKs EDBC for the same benefit month and in the most recent saved previously existing CalWORKs EDBC the person(s) did not have a role reason of 'FTP Immunization' (CT73_CE)
- or

There is not a previously existing CalWORKs EDBC for the current Benefit month and there is at least one CalWORKs EDBC for the previous month and in the most recent saved CalWORKs EDBC for the previous month the person did not have a role reason of 'FTP Immunization' (CT73_CE)

Action Fragment: CW_CH_ACTION6

Message Fragment: CW_CH_MESSAGE1

Ordering on NOA: New NOA reason will generate after the action fragment and before the message fragment.

2.2 Update form CW 2209 to generate with M40-105C and/or M40-181E

2.2.1 Overview

Form CW 2209 should generate when M40-105C and/or M40-181E (Immunization Verifications only) NOAs generate via EDBC.

State Form: CW 2209 (12/14)

Current Program(s): CalWORKs

Current Attached Form(s): N/A

Current Forms Category: Form

Current Template Repository Visibility: All Counties

Existing Languages: English, Spanish, Chinese, Russian

2.2.2 Form/NOA Verbiage

Update Form XDP

Adding Standard header and BRM header to the form CW 2209.

Updated Languages: English, Spanish

Form Header: CalSAWS Standard Header (Header_1), CalSAWS BRM Header (Header_BRM)

Form Mockups/Examples: See supporting document #2.

2.2.3 Form/NOA Variable Population

The following variables will be populated with this effort:

Variable Name	Population	Formatting*
<CASE_NAME>	Populates with the name of the primary applicant of the case.	Arial 10
<CASE_NUMBER>	Populates with the case number.	Arial 10
<DATE>	Current system date when the form is generated on. Format: "MM/DD/YYYY"	Arial 10

2.2.4 Form/NOA Generation Condition

1. Updates to Form Generation

This form generates via EDBC when one of the following is true:

- When M40-105C NOA generates via EDBC with NOA reason fragment added with recommendation 2.1.
or
- When M40-181E NOA generates via EDBC with NOA reason fragment CW_CH_MISSING_SCHOOL_IMMUNZTN_VERIF_A994 (ID: 7331) for 'FTP Immunizations Verifications'.

*Note: When displayed on the distributed documents page, the CW 2209 form is displayed separately from the NOA.

2. Update Form Control

Due Date: There is no due date to return this form.

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

3. Update Mailing Options

Mail-To (Recipient): When generated via EDBC, mail to the address of the primary applicant. When generated from the template repository, mail-to person selected from customer name dropdown.

Mailed From (Return): Sending office.

Mail-back-to-Address: County BRM address.

Outgoing Envelope Type: Standard Mail

Return Envelop Type: BRM

2.3 Update M40-181E to only trigger at Redetermination

2.3.1 Overview

Currently the M40-181E is generating whenever the EDBC fails for FTP Immunization or School Verification. By limiting the generation of the M40-181E to RE months with this SCR, the system will then generate either the M40-105C or M40-105E as appropriate.

Reason Fragment Name and ID:

CW_CH_MISSING_SCHOOL_IMMUNZTN_VERIF_A994 (ID: 7331)

State Form/NOA: M40-181E/NA 200 (11/2014)

Current NOA Template: CW_NOA_TEMPLATE (Fragment ID: 3026)

Current Program(s): CalWORKs
Current Action Type: Change
Current Fragment Level: Program
Currently Repeatable: No
Include NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: N/A
Existing Languages: English, Spanish, Chinese, Korean, Armenian, Cambodian, Tagalog, Russian, Vietnamese

2.3.2 Form/NOA Verbiage

There is no update to the NOA verbiage.

2.3.3 Form/NOA Variable Population

There is no update to the variable population.

2.3.4 Form/NOA Generation Conditions

1. Updates to Fragment Generation

The only update to the generation condition of this reason fragment is that now it will only be generated during redetermination which is 'EDBC run reason' code 'RE' (CT744_RE_RE).

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

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	NOA	M40-105C mockup when Immunization proof not provided	M40-105C_MockUp_EN.pdf

Number	Functional Area	Description	Attachment
		Note: The current CalSAWS version of the NA Back 9 will generate on the back of the first page. The current CalSAWS version of the NA 200 budget will be attached to the end of the NOA as applicable per existing logic.	
2	FORM	<p>CW2209 form mockup with Standard Header and BRM header</p> <p>Note: CW2209 will generate when the M40-105C NOA generates and/or M40-181E generates for 'Missing Immunization Verification'.</p>	CW2209_BRM_Header1_EN.pdf

CalsAWS

California Statewide Automated Welfare System



CA-240552 LA GR - Update Extended Suspend Period

[Deliverable Subtitle, if applicable]

[Date]

DOCUMENT APPROVAL HISTORY

Prepared By

Jose Gonzales

Reviewed By

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

4-15-2025

1.0

Initial Draft

Jose Gonzales,
Gerald
Limbrick, TK Bui

6-17-2025

1.1

Client Correspondence-
Added a note to keep
the existing verbiage for
ABP 4045 and ABP 4045S
for one of the bullet
points.

Jose Gonzales

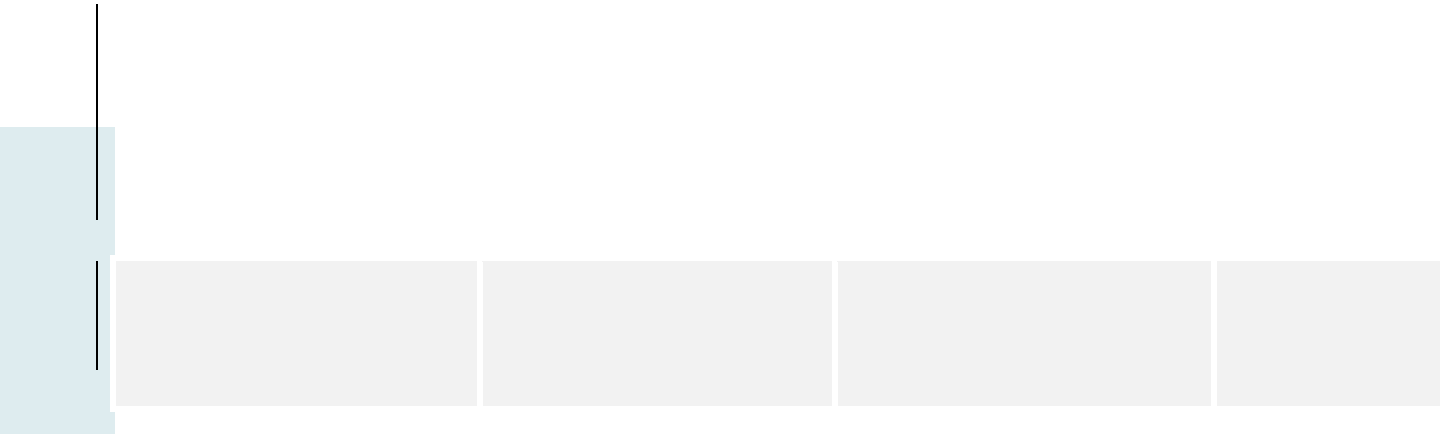


Table of Contents

1	OVERVIEW	4
1.1	Current Design	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions.....	4
2	RECOMMENDATIONS	6
2.1	Program Detail Page	6
2.2	Update NOA Reason Fragment Variable Population for ABP 4023-A.....	8
2.3	Update ABP 4023-T Template Variable Population	9
2.4	Update ABP 4023-C Template Variable Population	10
2.5	Updates to Existing ABP 4045 Form Verbiage	11
2.6	Updates to Existing ABP 4045S Form Verbiage	13
2.7	RE Date Report.....	17
3	SUPPORTING DOCUMENTS	21

CA-240552 LA GR - Update Extended Suspend Period

1 OVERVIEW

This SCR will update the Los Angeles (LA) County General Relief (GR) program extended suspend period to an end of month restoration period. With the update to the GR extended suspend period, the RE Date Report will also be updated to exclude LA County GR programs discontinued after the last calendar day of the month of the Effective Discontinuance Date.

1.1 Current Design

Modify the existing LA County GR program extended suspend period from the third Thursday of the month following discontinuance to the last calendar day of the month following discontinuance.

1.2 Requests

LA County GR Program is changing its extended suspend period and benefits rescission policy from the third Thursday of the month following discontinuance to the last calendar day of the month following discontinuance.

1.3 Overview of Recommendations

Modify the existing LA County GR extended suspend period from the third Thursday of the month following discontinuance to the last calendar day of the month following discontinuance. The 'GA/GR and CF Details' sheet in the RE Date Report will also be updated to exclude LA County GA/GR programs which are still Discontinued after the last calendar day of the month of the Discontinuance Effective Date.

1.4 Assumptions

- ABP 4045 and ABP 4045S NOA verbiage updates will only be in existing languages.
- CA-283604 will update the ABP 4023T Template Cover Page verbiage "Third Thursday" to "end of the month".
- CA-283604 will update the ABP 4023T Template action fragment verbiage.

- The page validation, on the Rescind Detail page, that protects/(prevents using) the 'Rescind' button unless the 'Comply Date' is within 30 days of the negative status's effective date does not apply to the LA County GR program.
- CA-283604 will dynamically change the template verbiage between GR and START notices. The variable population for the for End of Calendar month will be the same for both Templates.

2 RECOMMENDATIONS

2.1 Program Detail Page

2.1.1 Overview

The 'Rescind' button is displayed conditionally based on factors including the selected "View Date", the specific Program, and the specific type of negative status of each Person (the button only displays for a negative status e.g., Discontinued or Denied (unless the person has, both, specific role reasons and a role of either "Financially Responsible – Included" or "Financially Responsible - Excluded")). This SCR extends the timeframe in which the 'Rescind' button is displayed on the Program Detail page, for the LA County GR program. For the LA County GR program, show the 'Rescind' button thru the last calendar day of the month the program was discontinued, instead of thru the 3rd Thursday of the month, when all other Rescind conditions are met.

2.1.2 Program Detail Page Mockup

Program Persons				
Name	Role	Role Reason	Status	Status Reason
Tester, Johnnette 22F	MEM		Discontinued	Requested Disc. - Verbal
				<button>Rescind</button> <button>Reapply</button>

Figure 2.1.2.1 - Rescind Button

2.1.3 Description of Changes

1. Update the Program Detail page's logic to show the 'Rescind' button for the LA County GR program. For LA County, show the button thru the last calendar day of the month the GR program was discontinued (including on the last day of the month), instead of thru the 3rd Thursday of the month, when all other Rescind conditions are met.

Tech Note: see ProgramDetailHelper.canRescind

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Case Summary (click 'View Details' in the program block)

- 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.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Update NOA Reason Fragment Variable Population for ABP 4023-A

2.2.1 Overview

Update the variable population for ABP 4023-A

Reason Fragment Name and ID: GR_APPROVAL_G900 (Fragment ID: 7139)

Known County NOA: Los Angeles

Current NOA Template: GR_APPROVAL_TEMPLATE

Current Program(s): General Relief

Current Action Type: Approval

Current Fragment Level: Program

Currently Repeatable: No

Include NA Back 9: No

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

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

2.2.2 Form/NOA Verbiage

No updates to ABP 4023-A NOA verbiage will be made.

2.2.3 Form/NOA Variable Population

Add/Update Fragment Variable Population

Update the variable population for ThirdThursdayDate to the last calendar of the month date.

Variable Name	Population	Formatting*
End of Month	Populate the date of the last calendar day of the month.	Arial 10
Technical Note: Variable is currently named ThirdThursdayDate. Change the variable name in the system to avoid confusion.	Ex: 05/31/2025	

Variables Requiring Translations: N/A

2.2.4 Form/NOA Generation Conditions

No generation updates will be made for the ABP 4023-A NOA.

2.3 Update ABP 4023-T Template Variable Population

2.3.1 Overview

Update date variable population.

State Form/NOA: ABP 4023-T (GR_TERMINATION_TEMPLATE - 3017)

Known County NOA: Los Angeles

Existing Template Revision Date: N/A

Current Program(s): LA General Relief

Include NA Back 9: No

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

2.3.2 Form/NOA Verbiage

No changes in ABP 4023T verbiage with this effort.

Note: The verbiage from the first sentence: "... unless you act before xx/xx/xxx." Will be changed with CA-283604.

2.3.3 Form/NOA Variable Population

Add/Update Fragment Variable Population

Update the variable population for the following variables.

Variable Name	Population	Formatting*
End of Month	Populate with the date of the last calendar day of the month following termination.	Arial 10
Technical Note: Variable is currently named ThirdThursdayDate. Change the variable name in	Note: This variable populates twice in the notice. Ex: 05/31/2025	

the system to avoid confusion.		
--------------------------------	--	--

Variables Requiring Translations: N/A

2.3.4 Form/NOA Generation Conditions

No changes to ABP 4023-T generation conditions.

2.4 Update ABP 4023-C Template Variable Population

2.4.1 Overview

Update date variable population.

State Form/NOA: ABP 4023-C (GR_CHANGE_TEMPLATE - 3019)

Known County NOA: Los Angeles

Existing Template Revision Date: N/A

Current Program(s): LA General Relief

Include NA Back 9: No

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

2.4.2 Form/NOA Verbiage

No changes in ABP 4023C verbiage with this effort.

2.4.3 Form/NOA Variable Population

Add/Update Fragment Variable Population

Update the variable population for the following variables.

Variable Name	Population	Formatting*
End of Month	Populate with the date of the last calendar day of the month following termination.	Arial 10
Technical Note: Variable is currently named ThirdThursdayDate. Change the variable name in the system to avoid confusion.	Note: This variable populates twice in the notice. Ex: 05/31/2025	

Variables Requiring Translations: N/A

2.4.4 Form/NOA Generation Conditions

No changes to ABP 4023-C generation conditions.

2.5 Updates to Existing ABP 4045 Form Verbiage

2.5.1 Overview

Update the English and Spanish verbiage on ABP 4045.

State Form: ABP 4045

Current Programs: General Relief

Current Attached Form(s): None

Current Forms Category: Appointment Letter

Current Template Repository Visibility: Los Angeles

Existing Languages: English, Spanish

2.5.2 Form/NOA Verbiage

Update the verbiage for ABP 4045.

Update Form XDP

Updated Languages: English, Spanish

Form Number: ABP 4045 (REV. 05/2025)

Form Mockups/Examples: See Supporting Documents #1

1. The following is the change in English verbiage:

Note: See Supporting Documents #2 for Spanish

Existing Text	Updated Text	Location in Document
Please Note: To avoid losing your GR cash aid, you have until the third Thursday of the month following the date your GR cash aid has stopped to complete your GR	Please Note: To avoid losing your GR cash aid, you have until the <u>end</u> of the month following the date your GR cash aid has stopped to complete your GR work	First page Please Note boxed section

work requirement(s) or show that you had a good reason for not completing the requirement(s). Call the Customer Service Center about how to do this.	requirement(s) or show that you had a good reason for not completing the requirement(s). Call the Customer Service Center about how to do this.	
You do <u>NOT</u> need to go to your hearing.	You do <u>NOT</u> need to have a hearing.	First Page First box option first bullet point
Your GR cash aid <u>WILL STOP</u> if you do not go to your hearing to explain the reason you did not complete your GR activity requirement(s) or show that you did complete <u>it/them</u>.	Your GR cash aid <u>WILL STOP</u> if you do not request a hearing to explain the reason you did not complete your GR activity requirement(s) or show that you did complete <u>it/them</u>.	First page Second box option
Go to your hearing to explain what happened. Your hearing is scheduled for:	Contact your GR Hearing Officer to request a hearing and to explain what happened. You may call your GR Hearing Officer at the number listed below:	First page Second bullet point under the " Here is what you can do to keep your GR cash aid: " section
See above for your hearing date, time, and location.	See above for your GR Hearing Officer's telephone number. If unable to contact via telephone, you may request a hearing be conducted in-person.	First page first bullet point under the "To prepare for the hearing:" section
Before your hearing, you can look at your GR file at the DPSS office.	Before your hearing, you can ask to look at your GR file.	First page second bullet point under the "To prepare for the hearing:" section
You can bring any documents or people you think can help at the hearing, but no	You can provide any documents or have people you think can help with you during the hearing, but no	First page third bullet point under the "To prepare for the hearing:" section

documents or witnesses are required.	documents or witnesses are required.	
--------------------------------------	--------------------------------------	--

2.5.3 Form/NOA Variable Population

Update the following variable population are on the ABP 4045 in English and Spanish.

Variable Name	Population	Formatting
<GR Hearing Officer Name>	Populates with GR Hearing Officer Name Technical Note: GR_HEAR_OFFCR_NAME on the first line from DOC_DATA table.	Arial Font Size 10
<GR Hearing Officer Phone Number>	Populates with the GR Officer Phone Number Technical Note: GR_HEAR_PH_NUM on the second line from DOC_DATA table.	Arial Font Size 10

2.5.4 Form/NOA Generation Conditions

No updates to ABP 4045 generation conditions.

2.6 Updates to Existing ABP 4045S Form Title and Verbiage

2.6.1 Overview

Update the English title and verbiage on ABP 4045S.

Existing County Form: ABP 4045G

Current Programs: GROW

Current Attached Form(s): None

Current Forms Category: Appointment Letter

Current Template Repository Visibility: Los Angeles

Existing Languages: English

2.6.2 Form/NOA Verbiage

Update the verbiage for ABP 4045S verbiage and Form footer.

Update Form XDP

Updated Languages: English

Form Header:

Form Title:

- **Title listed on Template Repository/Document List page:** START Noncompliance Review Form
- **Title printed on the Form:** START Noncompliance Review Form

Form Number: ABP 4045S (REV. 05/2025)

Forms Category: Appointment Letter

Template Repository Visibility: LA County

Imaging Form Name: START Noncompliance Review Form

Form Mockups/Examples: See Supporting Documents #3

Existing Text	Updated Text	Location in Document
GROW Noncompliance Review Form	START Noncompliance Review Form	First page Title of form
START Worker Name: START Worker Telephone Number:	START Case Manager: START Case Manager Telephone Number:	First page Header section on top right of page
Please Note: To avoid losing your GR cash aid, you have until the third Thursday of the month following the date your GR cash aid has stopped to complete your GROW work requirement(s) or show	Please Note: To avoid losing your GR cash aid, you have until the <u>end</u> of the month following the date your GR cash aid has stopped to complete your START work requirement(s) or show that you had a	First page Please Note boxed section

that you had a good reason for not completing the requirement(s). Call your GROW Worker about how to do this.	good reason for not completing the requirement(s). Call your START Case Manager about how to do this.	
GROW Worker Name: GROW Worker Telephone Number:	START Case Manager Name: START Case Manager Telephone Number:	First page top left header
You do <u>NOT</u> need to go to your hearing.	You do <u>NOT</u> need to have a hearing.	First page first box option first bullet point
Your GR cash aid <u>WILL STOP</u> if you do not go to your hearing to explain the reason you did not complete your <u>GROW activity</u> requirement(s) or show that you did complete it/them.	Your GR cash aid <u>WILL STOP</u> if you do not request a hearing to explain the reason you did not complete your START activity requirement(s) or show that you did complete it/them.	First page second box option
You did not give an appropriate reason for not doing your GROW activity.	You did not give an appropriate reason for not doing your START activity.	First page second box option first sub box option under the "DPSS did not stop the termination or reduction of your GR cash aid because:" section
Contact your GROW Worker to find out what you can do to meet GROW requirements.	Contact your START Case Manager to find out what you can do to meet START requirements.	First page first bullet point under the " Here is what you can do to keep your GR cash aid: " section
Go to your hearing to explain what happened. Your hearing is scheduled for:	Contact your START Hearing Officer to request a hearing and to explain what happened. You may call your START Hearing Officer at the number listed below:	First page second bullet point under the " Here is what you can do to keep your GR cash aid: " section

See above for your hearing date, time, and location.	See above for your START Hearing Officer's telephone number. If unable to contact via telephone, you may request a hearing be conducted in-person.	First page first bullet point under "To prepare for the hearing:" section.
Before your hearing, you can look at your GR file at the DPSS office.	Before your hearing, you can ask to look at your GR file.	First page second bullet point under "To prepare for the hearing:" section.
You can bring any documents or people you think can help at the hearing, but no documents or witnesses are required.	You can provide any documents or have people you think can help with you during the hearing, but no documents or witnesses are required.	First page third bullet point under "To prepare for the hearing:" section.
GROW WORKER NAME	START Case Manager NAME	Top of second page Staff name variable under the "To prepare for the hearing:" section.
What is a Willful and Negligent failure to complete a GROW activity?	What is a Willful and Negligent failure to complete a START activity?	Bold title sentence above the Willful Acts and Negligent Acts
Willful act means you did not do your GROW activity on purpose, and	Willful act means you did not do your START activity on purpose, and	Second page first bullet point in the Willful Acts graph

2.6.3 Form/NOA Variable Population

Update the following variable population are on the ABP 4045S in English.

Variable Name	Population	Formatting
<GROW Hearing Officer Name>	Populates with GROW Hearing Officer name Technical Note: GW_HEAR_OFFCR_NAME on the first line from DOC_DATA table.	Arial Font Size 10
<GROW Hearing Officer Phone Number>	Populates with the GROW Hearing Officer Phone Number Technical Note: GW_HEAR_PH_NUM on the second line from DOC_DATA table.	Arial Font Size 10

2.6.4 Form/NOA Generation Conditions

No updates to ABP 4045S generation conditions.

2.7 RE Date Report

2.7.1 Overview

The RE Date Report is a daily refreshed on request management report that is used by county workers to process redeterminations (REs). This report provides data on cases with a CalWORKs, CalFresh, Transitional Nutrition Benefit, General Assistance/General Relief, or Medi-Cal program where there is an RE that is due or coming due.

Currently, in the 'GA/GR and CF Details' sheet of the RE Date Report, any GA/GR programs which are in Discontinued status as of the report date are displayed, as long as the report date is less than or equal to the third Thursday after the Discontinuance Effective Date. GA/GR programs which have been Discontinued longer than the third Thursday after the Discontinuance Effective Date are dropped from the report.

The report will be updated for the LA County GR to exclude GR programs which have been Discontinued for longer than the last calendar day of the month of the Discontinuance Effective Date, regardless of whether the last calendar day is a weekend or holiday.

2.7.2 RE Date Report Mockup

N/A — This SCR does not include any cosmetic changes to the RE Date Report.

2.7.3 Description of Change

1. The current base population of the RE Date Report is as follows:
 - a. The program is one of the following (CT-18):

Code-18	Short Description	Counties
GA	General Assistance/General Relief	Los Angeles
GM	General Assistance (Managed)	Amador, Butte, Calaveras, Colusa, Del Norte, Glenn, Humboldt, Imperial, Inyo, Kern, Kings, Lake, Lassen, Madera, Marin, Mariposa, Mendocino, Merced, Modoc, Mono, Monterey, Napa, Nevada, Plumas, Riverside, San Benito, San Joaquin, Shasta, Sierra, Siskiyou, Stanislaus, Sutter, Tehama, Trinity, Tuolumne, Yuba
GN	General Assistance (Non-Managed)	Amador, Butte, Calaveras, Colusa, Del Norte, El Dorado, Glenn, Humboldt, Imperial, Inyo, Kern, Kings, Lake, Lassen, Madera, Marin, Mariposa, Mendocino, Merced, Modoc, Mono, Monterey, Napa, Nevada, Plumas, Riverside, San Benito, San Bernardino, San Joaquin, Shasta, Sierra, Siskiyou,

		Stanislaus, Sutter, Tehama, Trinity, Tuolumne, Yuba
GR	GA/GR Automated Solution	Alameda, Contra Costa, Fresno, Orange, Placer, San Diego, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Solano, Sonoma, Tulare, Ventura, Yolo

- b. The program has an RE due. An RE due is defined as having no completion date.
- c. One of the following three conditions is met:
 - i. The program status as of the report date is **AC** – Active or **IN** – Ineligible (CT-72).
 - ii. The program status as of the report date is **DS** – Discontinued (CT-72), and the report date is less than or equal to the third Thursday after the Discontinuance Effective Date.
 - iii. The program status as of the report date is **PE** – Pending (CT-72) due to a rescission.
 - iv. **Note:**
 1. A program that is Discontinued for longer than the third Thursday after the Discontinuance Effective Date is dropped from the report because it can no longer be rescinded.
 2. The base population does not capture programs that have a current program status of Denied status.
2. Update the base population of the RE Date Report with the following, only when the program is **GA** – General Assistance/General Relief (LA County-specific change):
 - a. From point 1c above, update point (ii) such that this condition uses the last calendar day of the month of the Discontinuance Effective Date, instead of the third Thursday. With this update, a program that is Discontinued for longer than the last calendar day of the month of the Discontinuance Effective Date is dropped from the report because it can no longer be rescinded.

Example: If the discontinuance is effective on 4/1/2025, the current suspend period is 4/17/2025, which is the third Thursday of the month. With this change, the new suspend period becomes 4/30/2025, which is the last calendar day of the month. So, the program will be dropped on 5/1/2025 if it is still in Discontinued status.

2.7.4 Report Location

- **Global:** Reports
- **Local:** On Request
- **Task:** Case Activity

2.7.5 Counties Impacted

Only LA County will be impacted.

2.7.6 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

2.7.7 Report Usage/Performance

No changes to report usage or performance are expected.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Form	ABP 4045 English Mock Up	ABP 4045 English Mock Up.pdf
2	Form	ABP 4045 Spanish Mock Up	ABP 4045 Spanish Mock Up.pdf
3	Form	ABP 4045S Mock Up	ABP 4045S Mock Up.pdf



California Statewide Automated Welfare System

Design

CA-240701

Eliminate CalFresh, CFAP WTW Comparable
Disqualification Policy and Generate CF 377.10 for
Failure to meet the CalFresh Work Rules

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Justin Bourbonniere, Srinivas Meenavalli, Erika Kusnadi	
	Reviewed By	Tiffany Huckaby, Caroline Bui, Norma Meza	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
04/10/2025	1.0	Initial Draft	Justin Bourbonniere
04/30/2025	1.1	Update design to latest template	Justin Bourbonniere
05/08/2025	1.2	BA Feedback – Update Sections 1.1 to 1.4	Justin Bourbonniere
05/19/2025	1.3	Update Request, 2.6.3, 2.7.4 and 2.9.4 generation conditions	Justin Bourbonniere

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	2
1.4	Assumptions.....	3
2	RECOMMENDATIONS	3
2.1	Eligibility Non-Compliance Detail Page	3
2.2	EDBC Non-Compliance Changes	8
2.3	[Batch Name] – No Update Required	11
2.4	[Interface Name] – No Update Required.....	11
2.5	[eHIT] – No Updates Required.....	11
2.6	Correspondence - Add New CF 377.10 NOA Action Fragment.....	11
2.7	Correspondence - Add New CF 377.10 NOA Reason Fragment	14
2.8	Correspondence - Add New CF 377.10 NOA Message Fragment.....	17
2.9	Correspondence - Add Failing Work Registration NOA Reason Fragment	21
2.10	Correspondence - Add CF 377.10 to the Template Repository.....	25
2.11	[Report Name] – No Updates Required.....	26
2.12	[Data Warehouse Name] – No Updates Required	26
2.13	Add Instance value for historical record	27
2.14	Automated Regression Test	28
3	SUPPORTING DOCUMENTS	29
4	OUTREACH	29
5	APPENDIX.....	29

[CA-240701 – Eliminate CalFresh, CFAP WTW Comparable Disqualification Policy and Generate CF 377.10 for Failure to meet the CalFresh Work Rules]

1 OVERVIEW

CF 377.4 is generated for failure to meet CalFresh Work Registration when the CF individual is sanctioned for WTW and the worker manually enters comparable CalFresh noncompliance record for the individual.

1.1 Current Design

The CF 377.4 generates for failure to meet CalFresh work registration rules (i.e. reason F090).

When an individual is sanctioned from WTW the worker will manually enter a noncompliance for CalFresh if the individual does not meet any work registration exemptions.

1.2 Requests

Correspondence:

1. Add CF 377.10 Action fragment
2. Add CF 377.10 Reason fragment and generate for failure to meet CalFresh work registration rules.
3. Add CF 377.10 Message fragment
4. Add CF 377.10 to the Template Repository
5. Add Failing Work Registration NOA Reason Fragment

Online:

1. Update the Eligibility Non-Compliance Detail page for CalFresh program
 - a. Update the options found on the Type drop-down field
 - i. No longer display the option of 'WTW', rename the option 'CFET' to 'Work Registration' and rename the option 'Voluntary Quit/Striker' to 'Striker'.
 - b. Update the options found on the Reason field for the type of 'Work Registration' ('CFET' being updated to 'Work Registration' as part of this SCR).
 - i. No longer display the options of 'Didn't Cooperate with JS' and 'Didn't Do Work Assignment/Training'.

- ii. Rename 'Didn't Go to a Job' to 'Didn't Report to Your Employer for Work' and 'Didn't Keep Appointment/Give Info' to 'Didn't Give Information About Your Work History'.
- c. Update the options found on the Reason field for the type of 'Striker' ('Voluntary Quit/Striker' is being updated to 'Striker' as part of this SCR).
 - i. No longer display the options of 'Job Quit' and 'Reduced Work Effort'.
- d. Display an Instance field for the following reason options when the type is 'Work Registration' ('CFET' being updated to 'Work Registration' as part of this SCR): 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' and 'Reduced Hours'.
- e. Perform a one-time data change to add the value of '1' on the Instance field for existing records with the reason option of 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours'.

Eligibility:

1. Do not confer Modified Categorical Eligibility (MCE) to CalFresh Households, where the head of household has failed to comply with work requirements.

1.3 Overview of Recommendations

Correspondence:

1. Add CF 377.10 Action fragment
2. Add CF 377.10 Reason fragment and generate for failure to meet CalFresh work registration rules.
3. Add CF 377.10 Message fragment
4. Add CF 377.10 to the Template Repository
5. Add Failing Work Registration NOA Reason Fragment

Online:

1. Update the Eligibility Non-Compliance Detail page for CalFresh program
 - a. Update the options found on the Type drop-down field
 - i. No longer display the option of 'WTW', rename the option 'CFET' to 'Work Registration' and rename the option 'Voluntary Quit/Striker' to 'Striker'.
 - b. Update the options found on the Reason field for the type of 'Work Registration' ('CFET' being updated to 'Work Registration' as part of this SCR).
 - i. No longer display the options of 'Didn't Cooperate with JS' and 'Didn't Do Work Assignment/Training'.
 - ii. Rename 'Didn't Go to a Job' to 'Didn't Report to Your Employer for Work' and 'Didn't Keep Appointment/Give Info' to 'Didn't Give Information About Your Work History'.
 - c. Update the options found on the Reason field for the type of 'Striker' ('Voluntary Quit/Striker' is being updated to 'Striker' as part of this SCR).
 - i. No longer display the options of 'Job Quit' and 'Reduced Work Effort'.
 - d. Display an Instance field for the following reason options when the type is 'Work Registration' ('CFET' being updated to 'Work Registration' as part of this

- SCR): 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' and 'Reduced Hours'.
- e. Perform a one-time data change to add the value of '1' on the Instance field for existing records with the reason option of 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours'.

Eligibility:

1. Do not confer Modified Categorical Eligibility (MCE) to CalFresh Households, where the head of household has failed to comply with work requirements.

1.4 Assumptions

1. There are no other changes to the form's generation conditions or variable population logic, unless otherwise stated in this design document.
2. CA-290532 will add threshold languages to the CF 377.10 added in this SCR.
3. All existing functionalities will not be changed unless called out as part of this SCR.
4. There are no changes to the existing Eligibility Non-Compliance architecture.

2 RECOMMENDATIONS

2.1 Eligibility Non-Compliance Detail Page

2.1.1 Overview

The Eligibility Non-Compliance Detail page allows users to create, edit or view the Eligibility Non-Compliance information for all persons associated with the case who have not complied with program rules, who are avoiding the law, or who have been convicted for a drug felony. This SCR will update the available options on the Type and Reason field for the CalFresh program along with displaying the Instance field for other reason options when the type is 'Work Registration' (type of 'CFET' is being updated to 'Work Registration' as part of this SCR) for the program of CalFresh.

2.1.2 Eligibility Non-Compliance Detail Mockup

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Return

Cancel

Program:

CalFresh

Name: *

Mouse, Mickey 51M

Type: *

WTW

Reason: *

Didn't Sign WTW Plan

Instance: *

1

Begin Date: *

04/01/2025

End Date:



Comments:

Test

Save and Return

Cancel

Figure 2.1.1.a – Eligibility Non-Compliance Detail page (WTW type for historical records)

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Return

Cancel

Program:

CalFresh

Name: *

Mouse, Mickey 51M

Type: *

Work Registration

Reason: *

Didn't Cooperate with JS

Begin Date: *

04/01/2025

End Date:



Comments:

Testing

Save and Return

Cancel

Figure 2.1.1.b – Eligibility Non-Compliance Detail page (Work Registration type historical records where the reason option is one that is no longer to be displayed)

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Add Another

Save and Return

Cancel

Program:

CalFresh

Name: *

Mouse, Mickey 32M ▼

Type: *

Work Registration ▼

Reason: *

Didn't Give Information About Your Work History ▼

Instance: *

▼

Comments:

Save and Add Another

Save and Return

Cancel

This Type 1 page took 0.63 seconds to load.

Figure 2.1.1.c – Eligibility Non-Compliance Detail page (Instance field to be displayed for additional reason options)

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Add Another

Save and Return

Cancel

Program:

CalFresh

Name: *

Mouse, Mickey 32M ▼

Type: *

Work Registration ▼

Reason: *

Reduced Hours ▼

Instance: *

1 ▼

Begin Date: *



End Date:



Comments:

Save and Add Another

Save and Return

Cancel

This Type 1 page took 0.63 seconds to load.

Figure 2.1.1.d – Eligibility Non-Compliance Detail page (Instance field to be displayed for additional reason options)

2.1.3 Description of Changes

1. Update the options found on the 'Type' and 'Reason' fields on the Eligibility Non-Compliance Detail page when the Program is CalFresh.

- a. Update the options found on the 'Type' drop-down field

- i. No longer display 'WTW'.

1. For existing records, only the End Date field will be editable when the Eligibility Non-Compliance Detail page is in Edit mode.

Note: 'WTW' will continue to be an option under the 'Type' field for Cash Program.

Note: 'WTW' type for CalFresh program will continue to display on the Eligibility Non-Compliance List page for existing records.

- ii. Rename the option 'CFET' to 'Work Registration'.

1. The renaming of 'CFET' to 'Work Registration' will only apply for the CalFresh program.

2. For existing records with the type of 'CFET' for CalFresh program will automatically be updated to display as 'Work Registration' (including on the Eligibility Non-Compliance List page).

- iii. Rename the option 'Voluntary Quit/Striker' to 'Striker'.

1. The renaming of 'Voluntary Quit/Striker' to 'Striker' will only apply for the CalFresh program.

2. For existing records with the type of 'Voluntary Quit/Striker' for CalFresh program will automatically be updated to display as 'Striker' (including on the Eligibility Non-Compliance List page).

- b. Update the options found on the 'Reason' drop-down field when the option selected on the Type field is 'Work Registration' (this SCR is renaming the type of 'CFET' to 'Work Registration' for CalFresh program).

- i. No longer display the following options:

1. 'Didn't Cooperate with JS' and 'Didn't Do Work Assignment/Training'.

- a. The options of 'Didn't Cooperate with JS' and 'Didn't Do Work Assignment/Training' will no longer display on the 'Reason' drop-down field will only apply when the Type is 'Work Registration' and program is CalFresh.

- b. For existing records, only the End Date field will be editable when the Eligibility Non-Compliance Detail page is in Edit mode.

Note: 'Didn't Cooperate with JS' and 'Didn't Do Work Assignment/Training' reasons will continue to be displayed on the Eligibility Non-Compliance List page for existing records.

- ii. Rename the following options found on the 'Reason' drop-down field:

1. Rename 'Didn't Go to a Job' to 'Didn't Report to Your Employer for Work'.
 - a. The renaming of 'Didn't Go to a Job' to 'Didn't Report to Your Employer for Work' will only apply for the Type of 'Work Registration' and program is CalFresh.
 - b. For existing records with the reason of 'Didn't Go to a Job' (where program is CalFresh and type is 'Work Registration' will automatically be updated to display as 'Didn't Report to Your Employer for Work' (including on the Eligibility Non-Compliance Detail page).
2. Rename 'Didn't Keep Appointment/Give Info' to 'Didn't Give Information About Your Work History'.
 - a. The renaming of 'Didn't Keep Appointment/Give Info' to 'Didn't Give Information About Your Work History' will only apply for the Type of 'Work Registration' and program is CalFresh.
 - b. For existing records with the reason of 'Didn't Keep Appointment/Give Info' (where program is CalFresh, and type is 'Work Registration' will automatically be updated to display as 'Didn't Give Information About Your Work History' (including on the Eligibility Non-Compliance Detail page).
- c. Update the options found on the 'Reason' drop-down field when the option selected on the Type field is 'Striker' (this SCR is renaming the type of 'Voluntary Quit/Striker' to 'Striker' for CalFresh program).
 - i. No longer display 'Job Quit' and 'Reduced Work Effort'.
 1. The option of 'Job Quit' and 'Reduced Work Effort' will no longer be displayed on the 'Reason' drop-down field will only apply when the Type is 'Striker' and program is CalFresh.
 2. For existing records, only the End Date field will be editable when the Eligibility Non-Compliance Detail page is in Edit mode.

Note: 'Job Quit' and 'Reduced Work Effort' reasons will continue to be displayed on the Eligibility Non-Compliance List page for existing records.

Note: Only the reason of 'Striker' will be available for the type of 'Striker' for CalFresh program.
2. Add an 'Instance' field to the Eligibility Non-Compliance Detail page for CalFresh program with the type of 'Work Registration' and the reason of 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours'.
 - a. Instance field will automatically display when the option of 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours' is selected from the 'Reason' field.

- b. Instance field will be a required drop-down field and have the following options:
 - i. <Blank> (default value)
 - ii. 1
 - iii. 2
 - iv. 3
- c. The Begin Date and End Date field will not display when the option selected on the Instance field is <Blank >

Note: 'Instance' field will function the same way on the page as when the reason option of 'Quit a Job' or 'Turned Down a Job' is selected from the 'Reason' field for the type of 'Work Registration' for CalFresh Program.

Note: Selected option on the Instance field will automatically display on the 'Reason/Instance' column on the Eligibility Non-Compliance List page when the reason selected is 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours' for the type of 'Work Registration' and the program of CalFresh. It will display the same way as the reason option of 'Quit a Job' or 'Turned Down a Job'.

2.1.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Non-Compliance**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

Accessibility on the page was access and no updates are needed.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 EDBC Non-Compliance Changes

2.2.1 Overview

Currently EDBC will determine the Period of Ineligibility (POI) by the Eligibility rules based on the Non-Compliance (NC) Online Page data entered by the worker. The NC Type CFET will be renamed to Work Registration and NC Type Voluntary Quit/Striker will be renamed to Striker. The existing NC Eligibility logic should

continue determining the POI and set the person status reasons for the applicants based on the CT364 NC reference table mapping records.

2.2.2 Description of Changes

1. Update Reason Code descriptions in the Code Detail CT73 – Program Reason Codes for the renamed NC reasons.
2. Old CT73 Records shown below

CODE_NUM _IDENTIF	SHORT_DECODE_NAME	LONG_DECODE_NAME
BR	Didn't Go to Job # 1	Did Not Go to a Job # 1
BS	Didn't Go to Job # 2	Did Not Go to a Job # 2
BT	Didn't Go to Job # 3	Did Not Go to a Job # 3
BO	No Show/FTP #1	Did not Keep Apointment/Provide Information # 1
BP	No Show/FTP # 2	Did not Keep Apointment/Provide Information # 2
BQ	No Show/FTP #3	Did not Keep Apointment/Provide Information # 3

3. Update the CT73 records as below

CODE_NUM _IDENTIF	SHORT_DECODE_NAME	LONG_DECODE_NAME
BR	Didn't Report to Your Employer for Work # 1	Did Not Report to Your Employer for Work # 1
BS	Didn't Report to Your Employer for Work # 2	Did Not Report to Your Employer for Work # 2
BT	Didn't Report to Your Employer for Work # 3	Did Not Report to Your Employer for Work # 3
BO	Didn't Give Information About Your Work History # 1	Did Not Gave Information About Your Work History # 1
BP	Didn't Give Information About Your Work History # 2	Did Not Gave Information About Your Work History # 2
BQ	Didn't Give Information About Your Work History # 3	Did Not Gave Information About Your Work History # 3

4. Update the Eligibility rules to not confer Modified Categorical Eligibility (MCE) to CalFresh Households (CFHH), when the Primary Applicant has failed to comply with work requirements.

Note 1: Failing with work requirements means Primary Applicant being sanctioned due to an active Non-Compliance record with the NC Type "Work Registration".

Note 2: Below 3 CT73 reasons should be added to the list that already prevent CalFresh Head of Household from MCE.

CT73_BO, CT73_BP and CT73_BQ need to be included in the RuleCollectionConstants.CT73_MCE_HEAD_OF_HOUSEHOLD_NON_COOP_REASONS.

2.2.3 Example Scenarios

Example 1: When a CF person is entered with Program CalFresh, NC Type "Work Registration", NC Reason "Didn't Report to Your Employer for Work", Instance 1, Beg Date 11/01/2025 and run EDBC for the month 11/2025, this CF Person will get the EDBC results Active/FRE and Role Reason "Didn't Report to Your Employer for Work # 1".

Example 2: When a CF person is entered with Program CalFresh, NC Type "Work Registration", NC Reason "Didn't Give Information About Your Work History", Instance 1, Beg Date 11/01/2025 and run EDBC for the month 11/2025, this CF Person will get the EDBC results Active/FRE and Role Reason "Didn't Give Information About Your Work History # 1".

2.2.4 Programs Impacted

2.2.5 Performance Impacts

There are no foreseen performance impacts for the updated records in CT73 and MCE Eligibility rule changes.

2.3 [Batch Name] – No Update Required

2.4 [Interface Name] – No Update Required

2.5 [eHIT] – No Updates Required

2.6 Correspondence - Add New CF 377.10 NOA Action Fragment

2.6.1 Overview

This effort will add a new CF 377.10 NOA Action Fragment.

Known State NOA: CF 377.10 (2/24)

NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Program(s): CalFresh

Action Type(s): Change and Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Languages: English and Spanish

2.6.2 Form/NOA Verbiage

Add new CF 377.10 Action Fragment XDP

This effort will add a new CF 377.10 NOA action fragment.

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting
<STATIC_SECTION>	As of <SanctionDate>, the county is stopping benefits for <ClientName> because you did	Arial Font Size 10

	not follow the general CalFresh work rules (listed below).	
	You will be disqualified for <NumMonths> month(s). The disqualification period will end on <EndSanctionDate>.	
<AMOUNT_CHANGED_SECTION>	The amount of your household's CalFresh will be changed from <BenefitAmt> to <NewBenefitAmount>.	Arial Font Size 10

Add Dynamic Section

The change fragment will have a dynamically generated section (AMOUNT_CHANGED_SECTION). This section will display the change to the benefits amount. See Recommendation 2.6.4 for details on the section generation conditions.

2.6.3 Form/NOA Variable Population

Add New CF 377.10 Action Fragment Variable Population

Variable Name	Population	Formatting
SanctionDate	Populates with the first date of the sanction (i.e. 04/01/2024) as seen on the Eligibility Non-Compliance Detail Page. This value is found in the database as PERS_NON_COMPLY.BEG_DATE.	Arial Font Size 10, Date formatting MM/DD/YYYY
Person	Populates with the name of the person being sanctioned.	Arial Font Size 10
NumMonths	<p>If "1" Instance dropdown is selected on the Eligibility Non-Compliance Detail Page then populate "1".</p> <p>If "2" Instance dropdown is selected on the Eligibility Non-Compliance Detail Page then populate "3".</p> <p>If "3" Instance dropdown is selected on the Eligibility Non-Compliance Detail Page then populate "6".</p> <p>This value is found in the database as Didn't Co-Op JS #1 (CT73_L3) Didn't Co-Op JS #2 (CT73_L4)</p>	Arial Font Size 10

	Didn't Co-Op JS #3 (CT73_L5) FSET Non Part. # 1 (CT73_BX) FSET Non Part. # 2 (CT73_BY) FSET Non Part. # 3 (CT73_BZ) Didn't Go to Job # 1 (CT73_BR) Didn't Go to Job # 2 (CT73_BS) Didn't Go to Job # 3 (CT73_BT) No Show/FTP #1 (CT73_BO) No Show/FTP # 2 (CT73_BP) No Show/FTP #3 (CT73_BQ) Quit Job #1 (CT73_EZ) Quit Job #1 (CT73_F1) Quit Job #3 (CT73_F2) Reduced Hours #1 (CT73_BU) Reduced Hours #2 (CT73_BV) Reduced Hours #3 (CT73_BW) Turned Down a Job #1 (CT73_EW) Turned Down a Job #2 (CT73_EX) Turned Down a Job #3 (CT73_EY)	
EndSanctionDate	<p>The end date will be calculated based on the SanctionDate. The first day of the sanction will be assumed to be the first day of the month and the last day of the sanction will be assumed to be the last day of the month.</p> <p>Examples: 1=1 month sanction (Begin Date is 04/01/2024. On the notice, The disqualification period will end on 04/30/2024) 2=3 month sanction (Begin Date is 04/01/2024. On the notice, The disqualification period will end on 06/30/2024) 3=6 month sanction (Begin Date is 04/01/2024. On the notice, The disqualification period will end on 09/30/2024)</p>	Arial Font Size 10, Date formatting MM/DD/YYYY
BenefitAmount	Populates with the CalFresh Benefit amount from the most recently run previously existing CalFresh EDBC for the current benefit month if that exists, otherwise populates with the CalFresh Benefit amount from the most recently run EDBC for the month prior to the current EDBC benefit month.	Arial Font Size 10, currency formatting \$#,###.##
NewBenefitAmount	Populates with the new CalFresh benefit amount from the most recently run CalFresh EDBC for the same benefit month as the sanction.	Arial Font Size 10, currency formatting \$#,###.##

2.6.4 Form/NOA Generation Conditions

1. Add Action Fragment Dynamic Section Generation

The CF 377.10 Action NOA fragment has a dynamically generated section.

SECTION	GENERATION CONDITIONS
<AMOUNT_CHANGED_SECTION>	This section will generate when the action type is change.

2. Add Action Fragment Generation

This action fragment generates along with the reason from recommendation 2.7.

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

2.7 Correspondence - Add New CF 377.10 NOA Reason Fragment

2.7.1 Overview

This effort will add a new CF 377.10 NOA Reason Fragment.

Known State NOA: CF 377.10 (2/24)

NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Program(s): CalFresh

Action Type(s): Change and Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Languages: English and Spanish

2.7.2 Form/NOA Verbiage

Add new CF 377.10 Reason Fragment XDP

This effort will add a new CF 377.10 NOA reason fragment.

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting
STATIC_SECTION	Your CalFresh will stop because you did not:	Arial Font Size 10
<KEEP_JOB_SECTION>	Keep your job or keep working at least 30 hours a week.	Arial Font Size 10
<WORK_HIST_SECTION>	Give the county information about your work history if you are able to work.	Arial Font Size 10
<REPORT_SECTION>	Report to your employer for work.	Arial Font Size 10
<JOB_OFFER_SECTION>	Accept a good job offer.	Arial Font Size 10

2.7.3 Form/NOA Variable Population

1. Add New CF 377.10 Reason Fragment Variable Population

No variable population for this new reason.

2. Add Regulations for the new CF 377.10 Reason Fragment

The new CF 377.10 Reason has associated Regulations. The following Regulations will be added when the CF 377.10 Reason is generated on a NOA:

New Regulations: MPP Sections: 42-721, 63-407, 63-408.

3. Add NOA Title and Footer Reference for the new CF 377.10 Reason Fragment

The following are the references that will be included for the new CF 377.10 Reason Fragment.

NOA Reference on Document List Page: CF Work Rules

NOA Title: CALFRESH NOTICE OF DENIAL/DISQUALIFICATION FOR FAILURE TO MEET
GENERAL CALFRESH WORK RULES

NOA Title Requires Translations: Yes, available from CDSS

NOA Footer: CF 377.10 (2/24)

NOA Footer Requires Translations: No

2.7.4 Form/NOA Generation Conditions

1. Discontinuance NOA Generation - CF 377.10

Generate the Failing Work Registration Reason Fragment on the CF 377.10 NOA when the following conditions are true.

- There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the person did have an active status with a role of member.

OR

There is not a previously existing CalFresh EDBC for the current Benefit Month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the person did have an active status with a role of member.

- The person has an EDBC status reason listed in section 2.7.4 (CT73 codes).
- The CalFresh program has been discontinued.

2. Change NOA Generation - CF 377.10

Generate the Failing Work Registration Reason Fragment on the CF 377.10 NOA when the following conditions are true.

- There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the person did have an active status with a role of member.
- OR**
- There is not a previously existing CalFresh EDBC for the current Benefit Month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the person did have an active status with a role of member.
- The person has an EDBC status reason listed in section 2.7.4 (CT73 codes).
 - The CalFresh program is active.

EDBC Status reasons to generate CF 377.10 when the action type is Change or Discontinuance:

Didn't Co-Op JS #1 (CT73_L3)
 Didn't Co-Op JS #2 (CT73_L4)
 Didn't Co-Op JS #3 (CT73_L5)
 FSET Non Part. # 1 (CT73_BX)
 FSET Non Part. # 2 (CT73_BY)
 FSET Non Part. # 3 (CT73_BZ)
 Didn't Go to Job # 1 (CT73_BR)
 Didn't Go to Job # 2 (CT73_BS)
 Didn't Go to Job # 3 (CT73_BT)
 No Show/FTP #1 (CT73_BO)
 No Show/FTP # 2 (CT73_BP)
 No Show/FTP #3 (CT73_BQ)
 Quit Job #1 (CT73_EZ)
 Quit Job #1 (CT73_F1)
 Quit Job #3 (CT73_F2)
 Reduced Hours #1 (CT73_BU)
 Reduced Hours #2 (CT73_BV)
 Reduced Hours #3 (CT73_BW)
 Turned Down a Job #1 (CT73_EW)
 Turned Down a Job #2 (CT73_EX)
 Turned Down a Job #3 (CT73_EY)

Ordering on NOA: This fragment will follow the action on the NOA.

1. Add Fragment Section Generation

This new Fragment will have four dynamic sections that display only when applicable.

Section	Generation Conditions
<KEEP_JOB_SECTION>	"Quit a job" selected or "Reduce Hours" selected from the Reason dropdown on the Eligibility Non-

	<p>Compliance Detail Page. This value is found in the database as:</p> <p>Quit Job #1 (CT73_EZ)</p> <p>Quit Job #1 (CT73_F1)</p> <p>Quit Job #3 (CT73_F2)</p> <p>Reduced Hours #1 (CT73_BU)</p> <p>Reduced Hours #2 (CT73_BV)</p> <p>Reduced Hours #3 (CT73_BW)</p>
<WORK_HIST_SECTION>	<p>"Didn't give information about your work history" selected from the Reason dropdown on the Eligibility Non-Compliance Detail Page. This value is found in the database as:</p> <p>No Show/FTP #1 (CT73_BO)</p> <p>No Show/FTP # 2 (CT73_BP)</p> <p>No Show/FTP #3 (CT73_BQ)</p> <p>Note: This Reason dropdown is being updated in Section 2.2.2 of this design.</p>
<REPORT_SECTION>	<p>"Didn't report to your employer for work" selected from the Reason dropdown on the Eligibility Non-Compliance Detail Page. This value is found in the database as:</p> <p>Didn't Go to Job # 1 (CT73_BR)</p> <p>Didn't Go to Job # 2 (CT73_BS)</p> <p>Didn't Go to Job # 3 (CT73_BT)</p>
<JOB_OFFER_SECTION>	<p>"Turn down a job" selected from the Reason dropdown on the Eligibility Non-Compliance Detail Page. This value is found in the database as:</p> <p>Turned Down a Job #1 (CT73_EW)</p> <p>Turned Down a Job #2 (CT73_EX)</p> <p>Turned Down a Job #3 (CT73_EY)</p>

2.8 Correspondence - Add New CF 377.10 NOA Message Fragment

2.8.1 Overview

This effort will add a new CF 377.10 NOA Message Fragment.

Known State NOA: CF 377.10 (2/24)

Program(s): CalFresh

Action Type(s): Change and Discontinuance

Fragment Level: Person

Repeatable: Yes

Languages: English and Spanish

2.8.2 Form/NOA Verbiage

Add new CF 377.10 Message Fragment XDP

This effort will add a new CF 377.10 NOA message fragment.

NOA Mockups/Examples: See Supporting Documents #1

Description	Text	Formatting
<STATIC_SECTION>	<p>If you have a good reason for not meeting the general CalFresh work rules you must tell the county. The county may be able to excuse you from the work rules so you do not lose your CalFresh benefits.</p> <p>Good reasons include things out of your control like illness, no childcare for a child younger than age 12, or work conditions that are unreasonable. If the county determines that you have a good reason, there will be no change to your CalFresh benefits. If you think you have a good reason for not meeting the general CalFresh work rules, contact the county as soon as possible at <CountyPhoneNumber>.</p> <p>How to Keep Your CalFresh</p> <p>By <CountyContactDate>, you must give proof that you are meeting the general CalFresh work rules, or have a good reason for not meeting the work rules, or be excused from the general CalFresh work rules (see the following list). You may be excused from the general CalFresh work rules if you are:</p> <ul style="list-style-type: none">• Younger than age 16, or age 60 or older;	Arial Font Size 10

- Caring for a dependent child under age 6 (they do not have to live with you);
- Caring for a person with a disability (they do not have to live with you);
- Working at least 30 hours a week or earning at least \$<MinWageAmount> (current federal minimum wage x 30 hours) each week before taxes.
- Migrant and seasonal farm worker under contract or similar agreement with an employer or crew chief to be employed within 30 days.
- Getting or applying for unemployment benefits.
- Getting or applying for disability benefits from any source (disability benefits include, but are not limited to pensions, workers' compensation, disability insurance, Social Security, Supplemental Security Income, and veteran's benefits).
- Disabled or physically or mentally unfit for employment.
- Going to school, college, or a training program at least half-time (additional student eligibility rules may apply).
- Meeting work requirements for another program, like CalWORKs or General Assistance.
- In a drug or alcohol abuse treatment program.

Ask the county for help if you do not understand or know what you need to do to meet the general CalFresh work rules. If at any time, you think you may be excused for any of the reasons listed above, let the county know right away. The county may be able to

excuse you from the general CalFresh work rules.

Here's How To Get Your CalFresh Back

- If your CalFresh stops for not meeting the general CalFresh work rules you will have to reapply for benefits if you are the only one in your household. If others in your household are getting CalFresh benefits then you can contact your county welfare department or worker to be readded back to the benefits. To re-qualify, you must meet the general CalFresh work rules or be excused from the general CalFresh work rules before you can get CalFresh benefits again.
- You may reapply at any time once you meet the general CalFresh work rules, or become excused from the general CalFresh work rules, or once the disqualification period ends on <SanctionEndDate>.

2.8.3 Form/NOA Variable Population

Add New CF 377.10 Message Fragment Variable Population

Variable Name	Population	Formatting
<CountyPhoneNumber>	Populates with the same worker phone number as in the header.	Arial Font Size 10
<CountyContactDate>	Populates with the calculated value <SanctionDate> – 1 calendar day. <SanctionDate> is the same variable seen in 2.6 of this design.	Arial Font Size 10
<MinWageAmount>	Populates with the current Federal minimum wage x 30 hours. The current Federal minimum wage is found in the database as CT 1727. This value is calculated by multiplying the current Federal Minimum wage (CT 1727) x 30.	Arial Font Size 10

<SanctionEndDate>	Populates with the same <SanctionEndDate> as seen in section 2.6 of this design.	Arial Font Size 10
-------------------	--	--------------------

2.8.4 Form/NOA Generation Conditions

Add Message Fragment Generation

This generates with the reason fragment in 2.7.

Ordering on NOA: This will be the last fragment on the NOA.

2.9 Correspondence - Add Failing Work Registration NOA Reason Fragment

2.9.1 Overview

This effort will add a new Failing Work Registration NOA Reason Fragment. This NOA Fragment will display on CF 377.1A, CF 377.1 and CF 377.4 NOA's.

Known State NOA: CF 377.1A (08/21), CF 377.1 (2/13), CF 377.4 SAR (6/13)

NOA Template: CF_NOA_TEMPLATE (Fragment ID: 3027)

Program(s): CalFresh

Action Type(s): Denial, Partial/Mixed Approval, Change and Discontinuance

Fragment Level: Person

Repeatable: Yes

Include NA Back 9: Yes

Languages: English and Spanish

2.9.2 Form/NOA Verbiage

Add Failing Work Registration Reason Fragment XDP

This effort will add a new Failing Work Registration NOA reason fragment.

NOA Mockups/Examples: See Supporting Documents #4, 5, 6, 7

Description	Text	Formatting
STATIC_SECTION	<Person> did not follow the general CalFresh work rules (listed below).	Arial Font Size 10
<KEEP_JOB_SECTION>	Keep your job or keep working at least 30 hours a week.	Arial Font Size 10
<WORK_HIST_SECTION>	Give the county information about your work history if you are able to work.	Arial Font Size 10

<REPORT_SECTION>	Report to your employer for work.	Arial Font Size 10
<JOB_OFFER_SECTION>	Accept a good job offer.	Arial Font Size 10

Technical Note: The Spanish translations of the STATIC_SECTION is as follow: <Persona> no siguió las reglas generales de trabajo de CalFresh (enumeradas abajo). The translations of the failure reasons are available on the CF 377.10 from CDSS.

2.9.3 Form/NOA Variable Population

1. Add Failing Work Registration Reason Fragment Variable Population

Variable Name	Population	Formatting
Person	This is the same variable population described in section 2.6 of this design.	Arial Font Size 10

Technical Note: Fragments found on the CF 377.1A, CF 377.1 & CF 377.4 NOAS are all existing fragments and will follow their existing variable population logic. Only the reason fragment created in Section 2.9 of this design is new.

2. Add Regulations for the Failing Work Registration Reason Fragment

The new Failing Work Registration Reason has associated Regulations. The following Regulations will be added when the Failing Work Registration Reason is generated on a NOA:

Action Type	NOA	New Regulations
Denial	CF 377.1A	MPP Sections: 42-721, 63-407, 63-408.
Partial/Mixed Approval	CF 377.1	MPP Sections: 20-300, 63-300, 63-402, 63-503, 63-503.44, 63-805, 42-721, 63-407, 63-408.
Change & Discontinuance	CF 377.4	MPP Sections: 42-721, 63-407, 63-408.

3. Add NOA Title and Footer Reference for the Failing Work Registration Reason Fragment

The following are the references that will be included for the new WTW Registration Reason Fragment.

Action Type	NOA
Denial	CF 377.1A
Partial/Mixed Approval	CF 377.1
Change & Discontinuance	CF 377.4

NOA Reference on Document List Page: Follows existing CF 377.1A, CF 377.1 or CF 377.4 as outlined in the table above.

NOA Title: Follows existing CF 377.1A, CF 377.1 or CF 377.4 as outlined in the table above.

NOA Title Requires Translations: Follows existing CF 377.1A, CF 377.1 or CF 377.4 as outlined in the table above.

NOA Footer: Follows existing CF 377.1A, CF 377.1 or CF 377.4 as outlined in the table above.

NOA Footer Requires Translations: No

2.9.4 Form/NOA Generation Conditions

1. Add Reason Fragment Generation

a. Denial NOA Generation - CF 377.1A

Generate the Failing Work Registration Reason Fragment on the CF 377.1A NOA when the following conditions are true.

- There is not a previously existing EDBC for CalFresh.
OR
There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the person did not have an active status with a role of member.
OR
There is not a previously existing CalFresh EDBC for the current Benefit month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the person did not have an active status with a role of member.
OR
The benefit month is being run with the RE run reason.
- The person has an EDBC status reason listed in section 2.7.4 (CT73 codes).
- CalFresh program is denied.

b. Partial Approval NOA Generation - CF 377.1

Generate the Failing Work Registration Reason Fragment on the CF 377.1 NOA when the following conditions are true.

- There is not a previously existing EDBC for CalFresh.
OR
There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the person did not have an active status with a role of member.
OR
There is not a previously existing CalFresh EDBC for the current Benefit month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the person did not have an active status with a role of member.
OR
The benefit month is being run with the RE run reason.

- The person has an EDBC status reason listed in section 2.7.4 (CT73 codes).
- CalFresh program is active.

c. **Discontinuance NOA Generation - CF 377.4**

Generate the Failing Work Registration Reason Fragment on the CF 377.4 NOA when the following conditions are true.

- There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the person did have an active status with a role of member.

OR

There is not a previously existing CalFresh EDBC for the current Benefit Month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the person did have an active status with a role of member.

- The person has an EDBC status reason listed in section 2.7.4 (CT73 codes).
- The CalFresh program has been discontinued.

d. **Change NOA Generation - CF 377.4**

Generate the Failing Work Registration Reason Fragment on the CF 377.4 NOA when the following conditions are true.

- There is at least one existing CalFresh EDBC for the current Benefit month and in the most recent saved CalFresh EDBC for that month the person did have an active status with a role of member.

OR

There is not a previously existing CalFresh EDBC for the current Benefit Month and there is at least one CalFresh EDBC for the previous month and in the most recent saved CalFresh EDBC for the previous month the person did have an active status with a role of member.

- The person has an EDBC status reason listed in section 2.7.4 (CT73 codes).
- A benefit change NOA is already generating (CF 377.4).
- The CalFresh program is active.

Technical Note:

Fragments to generate per NOA are in the table below. These are the existing fragments that generate for these NOAs, with the new reason fragment from section 2.9 of this design.

Action Type	Generate NOA	Action Fragment	Reason Fragment	Message Fragment	Budget Fragments
Denial	CF 377.1A	4157	Section 2.9 Fragment	5135	N/A
Partial/Mixed Approval	CF 377.1	4161	Section 2.9 Fragment	5140	1285
Change	CF 377.4	4005	Section 2.9 Fragment	5007	1285
Discontinuance	CF 377.4	4010	Section 2.9 Fragment	5016	N/A

Ordering on NOA: This fragment will follow the action on the NOA.

2. **Add Fragment Section Generation**

This new Fragment will have four dynamic sections that display only when applicable. See section 2.7.4.2 for generation conditions of the dynamic sections.

2.10 Correspondence - Add CF 377.10 to the Template Repository

2.10.1 Overview

This effort will add the CF 377.10 (2/24) to the Template Repository.

State Form/NOA: CF 377.10 (2/24)

Attached Forms: NA Back 9 (5/22)

Program(s): CalFresh

Forms Category: NOA

Template Repository Visibility: All

Languages: English, Spanish

2.10.2 Form XDP

Add the new CF 377.10 form XDP.

Form Header: CalSAWS Standard Header (HEADER_1)

Imaging Document Type: Notification/NOA

Imaging Form Name: Failure to Meet CalFresh Work Rules

Form Number: CF 377.10

Form Title (Document List Page Displayed Name): Failure to Meet CalFresh Work Rules

CalSAWS Document Type: NOA

Form Description: Notice of failure to meet CalFresh work rules.

Add to Template Repository: Yes

Include NA Back 9: Yes

Form Mockups/Examples: See supporting document #2

2.10.3 Add Form Control

Add an Imaging Barcode for the CF 377.10.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.10.4 Add to the Template Repository

CalSAWS CA-240701 | Eliminate CalFresh, CFAP WTW Comparable Disqualification Policy and Generate CF 377.10 for Failure to meet the CalFresh Work Rules

CF 377.10 will be available in the Template Repository for all counties.

Required Document Parameters: Case Number, Customer Name, Language

2.10.5 Form Print Options and Mailing Requirements

The print options checked below will be available for this form.

Blank Template	Print Local Without Save	Print Local And Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y

The PRINT LOCAL WITHOUT SAVE option is only available when printing a blank template.

The PRINT AND SAVE options are only available when printing a document containing case or resource information.

Mailing Requirements:

Mail-To (Recipient): Person selected on the document parameters page

Mailed From (Return): Worker's Office/District Office Address

Mail-back-to Address: N/A

Outgoing Envelop Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: N/A

Enclosures: None

Electronic Signature: No

Check to Sign: No

Post to SSP: Yes

2.10.6 Form Variable Population

The form will not have any pre-population aside from the Header.

2.10.7 Form Generation Conditions

This is the form version that will be available via the template repository. Please see recommendation 2.7 for the NOA reason that will generate dynamically through EDBC.

2.11 [Report Name] – No Updates Required

2.12 [Data Warehouse Name] – No Updates Required

2.13 Add Instance value for historical record

2.13.1 Overview

Add the instance value of '01' for historical records where Eligibility Non-Compliance Detail record is for CalFresh program with the type of 'Work Registration' and the reason of 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours' as the required instance field are being added when these reason options are selected.

2.13.2 Description of Change

1. Do a one-time data change to add the value of '01' for the instance column for the following existing records:
 - a. Program is CalFresh
 - b. Type is Work Registration (the type 'CFET' is being updated to 'Work Registration' as part of this SCR).
 - c. Reason is 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' or 'Reduced Hours' (the reason of 'Didn't Go to a Job' and 'Didn't Keep Appointment/Give Info' is being rename to 'Didn't Report to Your Employer for Work', 'Didn't Give Information About Your Work History' as part of this SCR).

2.13.3 Estimated Number of Records Impacted/Performance

Roughly ~24,450 records will need to be updated to add the instance value of '01'.

2.14 Automated Regression Test

2.14.1 Overview

Update existing automated regression test scripts that create Eligibility Non-Compliance Detail records with a type of 'CFET' to use a type of 'Work Registration' instead.

2.14.2 Description of Change

1. Update the existing regression scripts that select 'CFET' from the Type dropdown on the Eligibility Non-Compliance Detail records to select 'Work Registration' from this dropdown.

Technical Note: Estimated impacted script count: 2

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Correspondence	CF 377.10 NOA Mockup	CF 377.10 NOA Mockup.pdf
2	Correspondence	CF 377.10 Form Mockup	CF 377.10 Form Mockup.pdf
3	Correspondence	CF_377_10_Spanish.pdf	CF_377_10_Spanish.pdf
4	Correspondence	377.1 NOA Mockup.pdf	377.1 NOA Mockup.pdf
5	Correspondence	377.1A NOA Mockup.pdf	377.1A NOA Mockup.pdf
6	Correspondence	CF 377.4 Change NOA Mockup.pdf	CF 377.4 Change NOA Mockup.pdf
7	Correspondence	CF 377.4 Disc NOA Mockup.pdf	CF 377.4 Disc NOA Mockup.pdf

4 OUTREACH

N/A

5 APPENDIX

N/A

Design

CA-263535

Add additional forms to CalSAWS CW - CF - CW/CF
and ESAP RE Packets

DOCUMENT APPROVAL HISTORY

Prepared By

Lalitha Valamarthi

Reviewed By

Priya Sridharan

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

04/23/2025

1.0

Initial Draft

Lalitha
Valamarthi

06/2/2025

1.1

1. Sections 2.6, 2.7, 2.8, and 2.9 have been revised to change the form name from MC 200 to NVRA VPF. Also included additional forms as per clarification from State.

Lalitha
Valamarthi

06/10/2025

1.1

1. Add CCP 7, TEMP 3022 and CW 2209 to the sections 2.6, 2.7.

2. Add NA 1273 to CW RE Packet.

Lalitha
Valamarthi

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions.....	1
2	RECOMMENDATIONS	3
2.1	[Page Name] – No Update Required	3
2.2	[Eligibility Rules Updates] – No Update Required	3
2.3	[Batch Name] – No Update Required	3
2.4	[Interface Name] – No Update Required.....	3
2.5	[eHIT] – No Update Required	3
2.6	Updates to CW RE Packet Recommendation	3
2.7	Updates to CW/CF RE Packet Recommendation	5
2.8	Updates to CF RE Packet Recommendation	6
2.9	Updates to ESAP CF RE Packet Recommendation.....	7
2.10	Update the Bundling Batch Job Property (Technical Change)	9
2.11	Update the Mailing Priority (Technical Change)	9
2.12	[Report Name] – No Update Required	9
2.13	[Data Warehouse Name] – No Update Required	10
2.14	[Data Change] – No Update Required	10
2.15	[Automated Regression Test] – No Update Required.....	10
3	SUPPORTING DOCUMENTS	10
4	OUTREACH	10
5	APPENDIX.....	10

CA-263535 – Add additional forms to CalSAWS CW - CF - CW/CF and ESAP RE Packets

1 OVERVIEW

This effort will be updating the CW, CF, CW/CF and ESAP RE CalSAWS packets to add the missing CDSS forms

1.1 Current Design

Currently, the redetermination packets for the 57 Counties do include all CDSS requirements forms. The packets have cover letters that reference forms within the packet itself. These cover letters were updated and the EBT 2216 was removed from the CF RE Packet and ESAP CF RE Packet for 57 Counties with SCR CA-271153.

1.2 Requests

Update the CW, CF, CW/CF and ESAP RE CalSAWS packets for the 57 migration counties to include the missing CDSS forms based on CRPC 2347 response.

1.3 Overview of Recommendations

1. Update the forms and cover letter of the following packets for all migration counties:
 - a. CW RE Packet (57 Counties)
 - b. CW/CF RE Packet (57 Counties)
 - c. CF RE Packet (57 Counties)
 - d. ESAP CF RE Packet (57 Counties)

1.4 Assumptions

1. There are no changes to the form generation conditions or variable population logic for any of the packets listed in this design document, unless otherwise called out in the recommendation section.
2. The California Voter Registration Card will be included at the Print Center.
3. This SCR will only update the CW, CF, CW/CF and ESAP RE Packets for the 57 migration counties.
4. There are no changes to the LA county CW, CF, CW/CF and ESAP RE Packets.
5. As part of SCR CA-271153, the cover letter has been updated to include instructions for completing SAWS 2 Plus, and Form EBT 2216 has been removed from both the CF RE Packet and the ESAP CF RE Packet.
6. Additional Forms to the TNB RE Packet will be added as part of SCR CA-265363.

7. CF 29 has been replaced by GEN 102 as part of this SCR CA-246603.
8. The changes introduced in this SCR will take effect when the batch to generate RE packets for the 57 migration counties runs in October 2025, for RE due cases in November 2025.

2 RECOMMENDATIONS

2.1 [Page Name] – No Update Required

2.2 [Eligibility Rules Updates] – No Update Required

2.3 [Batch Name] – No Update Required

2.4 [Interface Name] – No Update Required

2.5 [eHIT] – No Update Required

2.6 Updates to CW RE Packet Recommendation

2.6.1 Overview

The CW RE Packet is sent out for the customer to complete for their annual redetermination. This recommendation will be to update the CW RE packet to include additional forms and update the cover letter.

State Form: Not a state form

Current Programs: CalWORKs

Current Attached Form(s): N/A

Current Forms Category: Application

Current Template Repository Visibility: 57 Counties (Migration Counties)

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

2.6.2 Form/NOA Verbiage

Update Form XDP

The packet will be updated to include additional forms as per supporting document #1.

1. Update the CW RE Packet to add the following forms:
 - Cover Sheet
 - Business Reply Mail (BRM) envelope

- Gen 102
- SAWS 2 Plus
- SAWS 2A SAR
- SAR 23
- SAR 22
- CW 52
- CW 80
- CW 2184
- CW 2186 A
- CW 2223
- NVRA VPF
- CW 101
- PUB 13
- PUB 275
- PUB 388
- TEMP CW 2225
- CW 2218
- CW 2219
- CW 2166
- CCP 7
- EBT 2216
- TEMP 2214 Additional Information About EBT
- TEMP 3022
- NA 1273
- CW 2209
- GEN 1365

Note: GEN 1365 will be included during the bundling process, as is currently being done.

2. Update the CW RE Packet to remove the following forms:
 - WTW 5
 - SAR7A
3. Cover letter updates:
 - update the cover letter to include the correct page numbers where the SAWS 2A SAR form is located.

2.6.3 Form/NOA Variable Population

There are no changes to the form variable population.

2.6.4 Form/NOA Generation Conditions

There are no changes to the form generation conditions.

2.7 Updates to CW/CF RE Packet Recommendation

2.7.1 Overview

The CW/CF RE Packet is sent out for the customer to complete for their annual redetermination. This recommendation will be to update the CW/CF RE packet to include additional forms and update the cover letter.

State Form: Not a state form

Current Programs: CalWORKs, CalFresh

Current Attached Form(s): N/A

Current Forms Category: Application

Current Template Repository Visibility: 57 Counties

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

2.7.2 Form/NOA Verbiage

Update Form XDP

The packet will be updated to include additional forms as per supporting document #1.

1. Update the CW/CF RE Packet to add the following forms:

- CalFresh/CalWORKs Coversheet
- Business Reply Mail (BRM) envelope
- GEN 102
- SAWS 2 PLUS
- SAWS 2A SAR
- SAR 23
- SAR 22
- CW 52
- CW 80
- CW 2184
- CW 2186A
- CW 2223
- NVRA VPF
- CW 101
- PUB 13
- PUB 275
- PUB 388
- TEMP CW 2225
- SAR 7
- CCP 7
- SAR 7A
- CW 2218
- CW 2219

- CW 2166
- TEMP 2214
- NA 1273
- TEMP 3022
- CW 2209
- GEN 1365

Note: GEN 1365 will be included during the bundling process, as is currently being done.

2. Update the CW RE Packet to remove the following forms:
 - WTW 5
3. Cover letter updates:
 - update the cover letter to include the correct page numbers where the SAWS 2A SAR form is located.

2.7.3 Form/NOA Variable Population

There are no changes to the form variable population.

2.7.4 Form/NOA Generation Conditions

There are no changes to the form generation conditions.

2.8 Updates to CF RE Packet Recommendation

2.8.1 Overview

The CF RE Packet is sent out for the customers to complete for their annual redetermination. This recommendation will be to update the CF RE packet to include additional forms and update the cover letter.

State Form: Not a state form

Current Programs: CalFresh

Current Attached Form(s): N/A

Current Forms Category: Application

Current Template Repository Visibility: 57 Counties

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

2.8.2 Form/NOA Verbiage

Update Form XDP

The packet will be updated to include additional forms as per supporting document #1.

1. Update the CF RE Packet to add the following forms:

- CalFresh Coversheet
- Business Reply Mail (BRM) envelope
- GEN 102
- CF 37
- NVRA VPF
- CW 2223
- SAR 7
- SAR 7A
- PUB 13
- PUB 275
- PUB 388
- TEMP 2214
- NA 1273
- GEN 1365

Note: GEN 1365 will be included during the bundling process, as is currently being done.

2. Cover letter updates:

- Update checkbox 2 of the cover letter from "MC 200 - Voter Registration and NVRA form" to "NVRA VPF."
- Update the cover letter to include the correct page numbers where the CF 37 form is located.

2.8.3 Form/NOA Variable Population

There are no changes to the form variable population.

2.8.4 Form/NOA Generation Conditions

There are no changes to the form generation conditions.

2.9 Updates to ESAP CF RE Packet Recommendation

2.9.1 Overview

The ESAP CF RE Packet is sent out for the customer to complete for their annual redetermination. This recommendation will be to update the ESAP CF RE packet to include additional forms and update the cover letter.

State Form: Not a state form

Current Programs: CalFresh

Current Attached Form(s): N/A

Current Forms Category: Application

Current Template Repository Visibility: 57 Counties

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

2.9.2 Form/NOA Verbiage

Update Form XDP

The packet will be updated to include additional forms as per supporting document #1.

1. Update the ESAP CF RE Packet to add the following forms:

- CalFresh Coversheet
- Business Reply Mail (BRM) envelope
- CF 377.2B
- CF 37
- NVRA VPF
- CW 2223
- PUB 13
- PUB 275
- PUB 388
- TEMP 2214
- NA 1273
- GEN 1365

Note: GEN 1365 will be included during the bundling process, as is currently being done.

2. Update the ESAP CF RE Packet to remove the following forms:

- EBT 2216

3. Cover letter updates:

- Update checkbox 2 of the cover letter from "MC 200 - Voter Registration and NVRA form" to "NVRA VPF."
- Update the cover letter to include the correct page numbers where the CF 37 form is located.

2.9.3 Form/NOA Variable Population

There are no changes to the form variable population.

2.9.4 Form/NOA Generation Conditions

There are no changes to the form generation conditions.

2.10 Update the Bundling Batch Job Property (Technical Change)

2.10.1 Overview

Currently in CalSAWS, the maximum number of pages for the full-size flat mail envelope is 49 physical pages. Update the bundling batch properties to increase the maximum number of pages for the flat mail envelope.

2.10.2 Form/NOA Verbiage

1. Update the batch property to:

- Add a maximum page limit of 60 physical pages for the full-size flat mail envelope used for mailing priority 04.

2.10.3 Form/NOA Variable Population

N/A.

2.10.4 Form/NOA Generation Conditions

N/A

2.11 Update the Mailing Priority (Technical Change)

2.11.1 Overview

Update the current mailing priority of the CW RE Packet from Priority 05 to Priority 04.

2.11.2 Form/NOA Verbiage

1. Update the mailing priority for the following packets to priority 04:

- CW RE Packet (57 Counties)

2.11.3 Form/NOA Variable Population

N/A.

2.11.4 Form/NOA Generation Conditions

N/A

2.12[Report Name] – No Update Required

2.13[Data Warehouse Name] – No Update Required

2.14[Data Change] – No Update Required

2.15[Automated Regression Test] – No Update Required

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Forms	CW RE Packet for 57 Counties	MIG_CW_RE_PACKET_EN.pdf
2	Forms	CW/CF RE Packet for 57 Counties	MIG_CWCF_RE_PACKET_EN.pdf
3	Forms	CF RE Packet for 57 Counties	MIG_CF_RE_PACKET_EN.pdf
4	Forms	ESAP CF RE Packet for 57 Counties	MIG_ESAP_CF_RE_PACKET_EN.pdf

4 OUTREACH

N/A

5 APPENDIX

N/A

Design

CA-277194

Update AAP Denial/Discontinuance NOAs Footer

DOCUMENT APPROVAL HISTORY

Prepared By

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
05/19/25	1.0	Initial draft	Steven Contreras
06/04/25	2.0	Automated testing not required updated	Steven Contreras
06/17/25	3.0	Minor edits clarifying footer only being updated	Steven Contreras
6/18/25	4.0	Minor clarification edits	Steven Contreras

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions.....	1
2	RECOMMENDATIONS	1
2.1	[Page Name] No Update Required	Error! Bookmark not defined.
2.2	[Eligibility Rules Updates] No Update Required	2
2.3	[Batch Name] No Update Required	2
2.4	[Interface Name] No Update Required.....	3
2.5	[eHIT] No Update Required	3
2.6	[Form/NOA Name]	3
2.7	[Report Name] No Update Required.....	3
2.8	[Data Warehouse Name] No Update Required	3
2.9	[Data Change] No Update Required	3
2.10	[Automated Regression Test] - No Testing Required	3
3	SUPPORTING DOCUMENTS	3
4	OUTREACH	3
4.1	Lists	Error! Bookmark not defined.
5	APPENDIX	3

CA-277194 – Update AAP Denial/Discontinuance NOAs Footer

1 OVERVIEW

This effort will update the Footer for the AAP Denial and Discontinuance NOA reasons to generate to the appropriate State version (10/23).

1.1 Current Design

Currently the automated AAP Denial and Discontinuance NOAs are generated from EDBC in the CalSAWS system under (11/16) and (9/18).

1.2 Requests

Update the Footer for the AAP Denial and Discontinuance NOA reasons to generate to the appropriate State version (10/23).

1.3 Overview of Recommendations

1. Update the Footer for the AAP Denial and Discontinuance NOA reasons to generate to the appropriate State version (10/23).

1.4 Assumptions

1. This SCR will only update the Footer for the AAP Denial and Discontinuance NOA reasons to generate to the appropriate State version (10/23).
2. There will only update the footer.
3. There will be no updates to verbiage.
4. There will be no updates to generation conditions.

2 RECOMMENDATIONS

2.1 Update the AAP Denial and Discontinuance NOA reasons to match the newest state version with updated footer (10/23)

2.1.1 Overview

This effort will update Denial and Discontinuance NOA reasons the latest state version of the NA 791 with (10/23) footer.

Reason Fragment Name and ID: NA
State Form: NA 791 (10/23)
Current NOA Template: NA

Current Programs: AAP
Current Action Type: Denial/Discontinuance
Current Fragment Level: Person
Currently Repeatable: Yes, per person.
Includes NA Back 9: Yes
Current Forms/NOAs Generated with this NOA: NA
Current Template Repository Visibility: All counties
Existing Languages: English, Spanish

2.1.2 Form/NOA verbiage

The footer on the NA 791 Form currently states the old revision date in the footer. This needs to be updated to the current revision, NA 791 (10/23).
 Note: NOA reason fragment verbiage will not be updated as they match (10/23) version.

Update Form XDP

Existing Text	Updated Text	Location in Document
NA 791 (11/16) – REQUIRED FORM	NA 791 (10/23) - Required Form	Footer of each page.
NA 791 (9/18)– Required Form	NA 791 (10/23) - Required Form	Footer of each page.

Updated Languages: English and Spanish
Form Mockups/Examples: See Supporting Documents #1.

2.1.3 Form/NOA Variable Population

There are no changes to the variable population.

2.1.4 Form/NOA Generation Conditions

There are no Form/NOA Generation Conditions changes.

2.2 [Eligibility Rules Updates] -No Update Required

2.3 [Batch Name] -No Update Required

2.4 [Interface Name] -No Update Required

2.5 [eHIT] -No Update Required

2.6 [Form/NOA Name]

See recommendations

2.7 [Report Name] -No Update Required

2.8 [Data Warehouse Name] -No Update Required

2.9 [Data Change] -No Update Required

2.10[Automated Regression Test] – No Testing Required

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Forms	NA 791 (10/23)	NA 791 10-23 State.pdf

4 OUTREACH

N/A

5 APPENDIX

N/A



California Statewide Automated Welfare System

Design

CA-280295

Update TEMP 2313 and TEMP 2035 Recoveries of Aid Status Reason

DOCUMENT APPROVAL HISTORY

Prepared By

Sumita Sinha, Susanna Martinez

Reviewed By

Eric Wu; Ravneet Bhatia

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

05/02/2025

1.0

Initial Draft

Sumita Sinha,
Susanna
Martinez

05/20/2025

1.1

Updated the Recovery
Account reason from 'EBT
Theft – Scamming' to 'EBT
Theft – Scam' to match
the issuance
replacement type value.Esequiel
Herrera-Ortiz

06/09/2025

1.2

Updated TEMP 2313 and
TEMP 2035 report
mockups to include a
Recoveries of Aid
exampleSusanna
Martinez

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions	1
2	RECOMMENDATIONS	2
2.1	Fiscal – Recovery Account Detail Page	2
2.2	Eligibility Rules Updates – No Impact	4
2.3	Batch Name – No Impact	4
2.4	Interface Name – No Impact	4
2.5	eHIT – No Impact	4
2.6	Form/NOA Name – No Impact	4
2.7	Report Name – No Impact	Error! Bookmark not defined.
2.8	Data Warehouse Name – No Impact	Error! Bookmark not defined.
2.9	Data Change – CTCR to Add Recovery Account Reason	9
2.10	Automated Regression Test – No Impact	9
3	SUPPORTING DOCUMENTS	10
4	APPENDIX	10
5	OUTREACH	10
5.1	Lists	10

CA-280295 – Update TEMP 2313 and TEMP 2035 Recoveries of Aid Status Reason

1 OVERVIEW

This effort is to introduce distinct Recovery Account Reasons for Skimming and Scam on recovery account creation for replacements due to Electronic Theft.

1.1 Current Design

CalSAWS currently does not have a way to differentiate whether a Recovery Account which was created for Replacements due to electronic theft was for Skimming or Scam.

Currently Recovery Accounts are created with reason as Electronic Theft.

The report logic in the TEMP 2313 and TEMP 2035 for Recoveries of Aid is looking for a reason code of Electronic Theft. This is causing the same recovery account transaction to be populated on both the TEMP 2313 and TEMP 2035 reports as there is not a way to differentiate if it is Electronic Theft due to Skimming or Scam.

1.2 Requests

1. Add distinct reason codes for Skimming and Scam for recovery account creation for replacements due to Electronic Theft.
2. Update the TEMP 2313 and TEMP 2035 reports' Recoveries of Aid logic to use the new Recovery Account Reasons to differentiate between Skimming and Scam.

1.3 Overview of Recommendations

1. Update Recovery Account Detail page to have 'Electronic Theft – Skimming' and 'Electronic Theft – Scam' as Reason.
2. Update the TEMP 2313 EBT THEFT – Scam report's Recoveries of Aid logic to utilize the 'Electronic Theft – Scam' reason.
3. Update the TEMP 2035 EBT THEFT – Skimming report's Recoveries of Aid logic to utilize the 'Electronic Theft – Skimming' reason.

1.4 Assumptions

1. All Recovery accounts created prior to this change with 'Electronic Theft' reason to be displayed as 'Electronic Theft – Skimming'.
2. All existing functionality for recovery account creation remains unchanged unless specified by the recommendations section of this design.
3. The changes to the TEMP 2313 and TEMP 2035 reports will be applied going forward once these changes are implemented in the CalSAWS system.

2 RECOMMENDATIONS

2.1 Fiscal – Recovery Account Detail Page

2.1.1 Overview

This SCR will introduce 2 distinct reason codes for Skimming and Scam for recovery account detail page.

1. Electronic Theft – Skimming
2. Electronic Theft – Scam

2.1.2 Recovery Account Detail Mockup

The mockup displays a web interface for the Recovery Account Detail Page. On the left, a sidebar titled 'Collections' contains a list of orange buttons: 'Recovery Account Search', 'Receipt Search', 'Create Receipt', 'Receipt Mass Upload Search', 'Receipt Mass Upload', 'Create External Recovery Account', 'Create Levy Account', 'Create Foster Care Trust Fund Account', 'Create Care and Maintenance Fund Account', 'Recovery Account Workload Inventory', 'Recovery Account Workload Reassignment', 'Tax Intercept Account Search', and 'Tax Intercept Account Search'. A dropdown menu is open from the 'Collections' header, listing various reason codes. 'Electronic Theft - Skimming' is highlighted in blue. Other options include 'Customer Caused', 'DIB', 'DMV Fees', 'Deceased Child', 'Decreased Special Needs', 'Duplicate CalFresh Received', 'Duplicate Child Support Disregard / Pass On', 'Duplicate Payment, Clothing', 'Duplicate Payment, Placement', 'Duplicate Payments Issued', 'Duplicate Warrants Cashed', 'EBT Error', 'Electronic Theft - Scam', 'Eligible Person / Child Out of Home', 'Emergency Assistance Foster Care', 'Exceed 48 Mths Time Limit', 'Excess Child Care', 'Excess Homeless Assistance', 'Excess Personal Property (Good Faith)', and 'EBT Error'. To the right of the dropdown, the 'Recovery Account Type' is set to 'Regular'. Below it, the 'Case Number' is displayed as a redacted black box. Further down, the 'Effective Date' is shown as '016'. At the bottom, the 'Status' is set to 'Active' and the 'Status Reason' is also set to 'Active'.

Collections	Reason Code	Recovery Account Type	Case Number	Effective Date	Status	Status Reason
Recovery Account Search	Customer Caused	Regular	[Redacted]	016	Active	Active
Receipt Search	DIB					
Create Receipt	DMV Fees					
Receipt Mass Upload Search	Deceased Child					
Receipt Mass Upload	Decreased Special Needs					
Create External Recovery Account	Duplicate CalFresh Received					
Create Levy Account	Duplicate Child Support Disregard / Pass On					
Create Foster Care Trust Fund Account	Duplicate Payment, Clothing					
Create Care and Maintenance Fund Account	Duplicate Payment, Placement					
Recovery Account Workload Inventory	Duplicate Payments Issued					
Recovery Account Workload Reassignment	Duplicate Warrants Cashed					
Tax Intercept Account Search	EBT Error					
Tax Intercept Account Search	Electronic Theft - Skimming					
	Electronic Theft - Scam					
	Eligible Person / Child Out of Home					
	Emergency Assistance Foster Care					
	Exceed 48 Mths Time Limit					
	Excess Child Care					
	Excess Homeless Assistance					
	Excess Personal Property (Good Faith)					
	EBT Error					

Figure 2.1.1 – Edit/Create Mode

The screenshot shows the CalSAWS system in Edit/Create Mode for a Fiscal account. The top navigation bar includes tabs for Ventura LC, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, **Fiscal**, Special Units, Reports, Client Corresp., and Admin Tools. The sidebar on the left lists various account types, with 'Recovery Account' selected. The main content area displays the 'Account Details' for a 'Recovery Account'.

Account Details		
Program Type: CalWORKs	Discovery Date: * 03/08/2023	Assigned To:
Cause: * Cash - Admin Caused		Cause Date: 03/08/2023
Reason: * Electronic Theft - Skimming		Expiration Date:
Status: * Active	Status Reason: * Active	Status Date: 03/18/2025
Is this an ICT: * No	Originating County:	External: No
Investigations: * None	Fraud Identification Date:	

Figure 2.1.2 – View Mode

2.1.3 Description of Changes

Change to have 2 requirements listed below

1. Updating the existing reason 'Electronic Theft' to new reason 'Electronic Theft – Skimming'.
2. Add a new reason 'Electronic Theft – Scam'.

2.1.4 Page Location

- **Global: Fiscal**
- **Local: Collections**
- **Task: Recovery Account Detail**

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.

2.2 Eligibility Rules Updates – No Impact

2.3 Batch Name – No Impact

2.4 Interface Name – No Impact

2.5 eHIT – No Impact

2.6 Form/NOA Name – No Impact

2.7 TEMP 2313 EBT THEFT – Scam

2.7.1 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. The Recoveries of Aid logic in the report will be updated to look for records having a Recovery Account Reason of 'Electronic Theft – Scam'.

2.7.2 TEMP 2313 EBT THEFT – Scam Mockup

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									
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:	\$44	\$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):	(\$44)	(\$100)	\$0	\$0	\$0	\$0	\$0	(\$100)	\$1
7 Total Number of Payments Issued:	0	0	0	0	0	0	0	0	1
*Amounts reported in this column will not be reimbursed. Refer to CFL 23/24-55 regarding this change.									
**Amounts reported in this column will not be reimbursed. Refer to CFL 24/25-41 regarding this change.									
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 <div></div>									
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 <div></div>									

Figure 2.7.2.1 – TEMP 2313 EBT THEFT - Scam Report – TEMP 2313 SCAM Sheet

Note: No cosmetic changes are required at this time. The full 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											
Recoveries of Aid											Summary
Totals											
Transactions: 0											Amount: \$0.00
Reporting Column	Program	Case Number	Case Name	Payee Name	Transaction Number	Account Number	Benefit Month	Transaction Date	Authorizing Worker ID	Amount	

Figure 2.7.2.2 – TEMP 2313 EBT THEFT - Scam Report – Recoveries of Aid Sheet

Note: No cosmetic changes are required at this time. The full mockup can be found in the Supporting Documents section.

2.7.3 Description of Change

1. Update the TEMP 2313 EBT THEFT – Scam report's Recoveries of Aid logic to utilize the 'Electronic Theft – Scam' status reason.

- a. The logic specific to capturing the Recoveries of Aid data will be updated to add a condition that filters for records with a reason of 'Electronic Theft – Scam' and will no longer look for the reason of 'Electronic Theft'.
 - i. 'Electronic Theft – Scam' is a new reason being created under this SCR in the Fiscal changes described above per section **2.1 Fiscal – Recovery Account Detail Page**.

Tech Notes:

- CT119 in the CODE_DETL table
 - RECOV_ACCT_DETL.RSN_CODE
 - For the code value please work with the Fiscal developer who will be determining the value.
- b. This change will apply to the Recovery Account logic that populates in the 'TEMP 2313 SCAM' summary sheet and 'Recoveries of Aid' detail sheet.

2.7.4 Report Location

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

2.7.5 Counties Impacted

All counties will be impacted by these changes.

2.7.6 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

2.7.7 Report Usage/Performance

No significant change in report usage or performance is expected to occur from these changes.

2.8 TEMP 2035 EBT THEFT - Skimming

2.8.1 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. The Recoveries of Aid logic in the report will be updated to look for records having a Recovery Account Reason of 'Electronic Theft – Skimming'.

2.8.2 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 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	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 skimming in current claiming month	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100	
3	Recoveries of Aid for Prior AB 2035 issuances:	\$44	\$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):	(\$44)	(\$100)	\$0	\$0	\$0	\$0	\$0	(\$100)	\$1	
7	Total Number of Payments Issued:	0	0	0	0	0	0	0	0	1	
*Amounts reported in this column will not be reimbursed. Refer to CFL 23/24-55 regarding this change. **Amounts reported in this column will not be reimbursed. Refer to CFL 24/25-41 regarding this change.											
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 _____											
Last Modified 11/30/2021											

Figure 2.8.2.1 – TEMP 2035 EBT THEFT - Skimming Report – TEMP 2035 Skimming Sheet

Note: No cosmetic changes are required at this time. The full mockup can be found in the Supporting Documents section.

<div> <div>CalSAWS</div> <div>TEMP 2035 - Skimming</div> </div>										
County Name										
Report Month: 03/2025										
Run Date: APR-03-25 10:25 AM										
Recoveries of Aid										Summary
Totals					Transactions:		0		Amount:	
									\$0.00	
Reporting Column	Program	Case Number	Case Name	Payee Name	Transaction Number	Account Number	Benefit Month	Transaction Date	Authorizing Worker ID	Amount

Figure 2.8.2.2 – TEMP 2035 EBT THEFT - Skimming Report – Recoveries of Aid Sheet

Note: No cosmetic changes are required at this time. The full mockup can be found in the Supporting Documents section.

2.8.3 Description of Change

1. Update the TEMP 2035 EBT THEFT – Skimming report's Recoveries of Aid logic to utilize the 'Electronic Theft – Skimming' status reason.
 - a. The logic specific to capturing the Recoveries of Aid data will be updated to filter for records with a reason of 'Electronic Theft – Skimming' and will no longer look for the reason of 'Electronic Theft'.
 - i. The existing 'Electronic Theft' reason will be updated and renamed to 'Electronic Theft – Skimming' under this SCR in the Fiscal changes described above per section **2.1 Fiscal – Recovery Account Detail Page**.

Tech Notes:

- CT119 in the CODE_DETL table
 - RECOV_ACCT_DETL.RSN_CODE
 - No update to change the code value is required. Only the short description of the existing code value used is changing from 'Electronic Theft' to 'Electronic Theft – Skimming'.
- b. This will apply to the Recovery Account logic that populates in the 'TEMP 2035 Skimming' summary sheet and 'Recoveries of Aid' detail sheet.

2.8.4 Report Location

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

2.8.5 Counties Impacted

All counties will be impacted by these changes.

2.8.6 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

2.8.7 Report Usage/Performance

No significant change in report usage or performance is expected to occur from these changes.

2.9 Data Change – CTCR to Add Recovery Account Reason

2.9.1 Overview

Below describe required changes to populate Reason Codes for selections on Recovery Account Detail page.

2.9.2 Description of Change



1. CTCR to rename the existing Reason 'Electronic Theft' to 'Electronic Theft – Skimming' for category 119.
2. CTCR to add a new Reason 'Electronic Theft – Scam' for category 119.

2.9.3 Estimated Number of Records Impacted/Performance

2

2.10 Automated Regression Test – No Impact

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

N/A

5 OUTREACH

5.1 Lists

Provide a list of Recovery Accounts with ‘Electronic Theft - Skimming’ reason and in pending, pending approval, active, and suspended status.

List Name:

List Criteria:

Standard Columns:

- County Code
- Case Number
- Recovery Account Number
- Recovery Account Status

Frequency: One-time

County Action: The counties are to review the list and update the Recovery Account Reason from EBT THEFT - Skimming to EBT THEFT - Scam as applicable.

The list will be posted to the following location: CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-280295

Design

CA-281104

Add Generate Form Button for CW 2201 on
Employment page

DOCUMENT APPROVAL HISTORY

CalSAWS	Owner	Aishwarya Shankar, Trevor Torres
	Preparer	Aishwarya Shankar, Trevor Torres
	Reviewer	Priya Sridharan
	Approver	Paul Robertson
APPROVAL DATE	APPROVED VERSION	REVIEWED AND APPROVED BY
04/23/2025	1.0	Paul Robertson

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions.....	1
2	RECOMMENDATIONS	2
2.1	Employment Detail	2
2.1.1	Overview	2
2.1.2	Employment Detail Mockup.....	2
2.1.3	Description of Changes	3
2.1.4	Page Location	3
2.1.5	Security Updates	3
2.1.6	Page Mapping	4
2.1.7	Accessibility.....	4
2.1.8	Page Usage/Data Volume Impacts	4
2.2	Update CW 2201 Form Generation Conditions	5
2.2.1	Overview	5
2.2.2	Form Verbiage.....	5
2.2.3	Form Variable Population.....	5
2.2.4	Form Generation Conditions.....	5

CA-281104 – Add Generate Form Button for CW 2201 on Employment page

1 OVERVIEW

The effort of this SCR is to add a “CW 2201” button to generate the CW 2201 form from the Employment Detail online page.

1.1 Current Design

The automation logic to generate the CW 2201 form after an employment is end-dated on the Employment Detail page for CalWORKs participants was removed with SCR CA-273808.

1.2 Requests

Add a “CW 2201” button to the Employment Detail online page, so that the form can be generated manually by the worker without having to access the Template Repository. Update the generation logic of the CW 2201 form to account for the new functionality to generate the CW 2201 form manually from the Employment Detail online page by clicking the CW 2201 button.

1.3 Overview of Recommendations

1. Add a “CW 2201” button to the Employment Detail online page.
2. Update the generation logic of the CW 2201 form to be able to generate it manually from the Employment Detail online page.

1.4 Assumptions

1. All dynamically populated fields should remain editable when the CW 2201 form is generated from the Employment Detail page.
2. There are no changes to any existing functionality unless specified in this design document.

2 RECOMMENDATIONS

2.1 Employment Detail

2.1.1 Overview

The Employment Detail page allows users to add, edit, view or remove information regarding the categories of Employment, Employer Information, Job Information, and Status Information regarding hours and wages, and Actual Hours worked for all persons associated to the case.

This SCR will add a button to manually generate a CW 2201 form after employment is end-dated by a worker.

2.1.2 Employment Detail Mockup

Employment Detail

*- Indicates required fields

Images

Next

View Progress

Edit

Close

Change Reason

Change Reason:

Participant Provided - Verbal

Reported Date:

04/10/2025

Figure 2.1.1 – Employment Detail Current Functionality

Employment Detail

*- Indicates required fields

CW 2201

Images

Next

View Progress

Edit

Close

Change Reason

Change Reason:

Participant Provided - Verbal

Reported Date:

04/10/2025

View

Figure 2.1.2 – Employment Detail “CW 2201” Button Mockup

Job Information		
Job Title: * Job	Date Hired: * 08/10/2016	
Countable: No	Responsible Worker:	
Employment Type:	Health Insurance:	Benefit:
Job Description:		
Termination Date: 04/10/2025	Termination Date Entered: 04/10/2025	Termination Reason: * Laid Off
Date of Last Pay: * 04/25/2025		
Verified: * Verified View		
Created Date: 11/23/2016		

Figure 2.1.3 – Employment Detail “Termination Date” Current Functionality Example

2.1.3 Description of Changes

1. Add a button titled “CW 2201” to the Employment Detail page when in View mode, as shown in Figure 2.1.2.
 - a. Clicking on the “CW 2201” button will generate the ‘CW 2201’ form in a new window.
 - b. The button will only display if the following requirements are met:
 - i. The user is assigned to the ‘EmploymentDetailEdit’ Security Right.
 - ii. There is a saved value in the Termination Date field for the record, as shown in Figure 2.1.3.

2.1.4 Page Location

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

2.1.5 Security Updates

The Security Right ‘EmploymentDetailEdit’ and the Security Group ‘SIP Edit’ are both already existing in current functionality.

This SCR will allow users with the Security Right ‘EmploymentDetailEdit’ to display the “CW 2201” button on the Employment Detail page in View mode. As well as to update the Security Group description for ‘SIP Edit’ to include this change, as ‘SIP Edit’ includes the ‘EmploymentDetailEdit’ Security Right.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EmploymentDetailEdit	N/A	(No Change)

2. Security Groups

Security Group	Group Description	Group to Role Mapping
SIP Edit	Edit detailed information of customer SIP records. Allows access to the "CW 2201" button on Employment Detail page.	(No Change)

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Update CW 2201 Form Generation Conditions

2.2.1 Overview

This recommendation is to update the form generation conditions of the CW 2201 form.

State Form: CW 2201 (6/09)

Current Program: CalWORKs (CW), Medi-Cal (MC)

Current Attached Forms: None

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

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

Current Print Options: All

Current Posted to SSP: Yes

Electronic Signatures:

Electronic Signature (IVR/Text): Yes

Check to Sign: No

2.2.2 Form Verbiage

There are no updates to the form verbiage for the CW 2201 form.

2.2.3 Form Variable Population

There are no updates to the form variable population logic for the CW 2201 form.

2.2.4 Form Generation Conditions

Update form generation conditions of the CW 2201 to be able to generate the form manually by clicking the "CW 2201" button being added to the Employment Detail online page with this SCR.

1. Update Form Mailing Options

Mailing Options:

Mail-To (Recipient): When generated from the Template Repository, send to the customer name selected from the Document Parameters page. When generated from the Employment Detail online page, send to the customer name displayed on the Employment Detail record.

Note: All other form control, print options, and mailing requirements for the CW 2201 remain per the current design of the form in the system.

Design

CA-283219

Add Export Capability to the Worker Schedule
Search page

DOCUMENT APPROVAL HISTORY

CalSAWS	Prepared By	Trevor Torres	
	Reviewed By	Dymas Pena	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/26/2025	1.0	Initial Draft	Trevor Torres

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions.....	1
2	RECOMMENDATIONS	2
2.1	Worker Schedule Search.....	2
2.2	Worker Schedule Search Export Report.....	4
3	SUPPORTING DOCUMENTS	8
4	OUTREACH	9
5	APPENDIX.....	10

CA-283219 Add Export Capability to the Worker Schedule Search page

1 OVERVIEW

The Worker Schedule Search page currently does not have the functionality to allow users to export the search result to an excel report. This SCR will add export functionality to the Worker Schedule Search page.

1.1 Current Design

Currently, the Worker Schedule Search page does not have export capability. This page lists the pertinent information for us to assist with the assignment of CalFresh RE appointments.

1.2 Requests

Add an "Export to Excel" feature to the Worker Schedule Search page to extract the full search results to enhance the usability. The Excel spreadsheet would include all the columns that currently exist on the search results page and additional columns.

1.3 Overview of Recommendations

1. Add the export functionality to the Worker Schedule Search page.
2. Generate an Excel report for the Worker Schedule Search 'Search Results Summary'.

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. There are no changes to how the Worker Schedule Search page currently works, this SCR is to add the functionality to allow users to export the information to an Excel report (Information found on the 'Search Results Summary' of the Worker Schedule Search page is what is being exported to Excel).

2 RECOMMENDATIONS

2.1 Worker Schedule Search

2.1.1 Overview

The Worker Schedule Search page allows users to access a worker's existing appointments for a specified time period. This SCR will add the export functionality to the Worker Schedule Search page to allow users to export the 'Search Results Summary' to an Excel report.

2.1.2 Worker Schedule Search Mockup

Worker Schedule Search

*- Indicates required fields
▼ Refine Your Search

Search

Date Range:

From: * To: * Worker ID: 36AS00IZ00 Select

03/26/2025 06/26/2025

Results per Page: 25 Search

Search Results Summary Results 1 - 2 of 2

Date	Fixed Appt.	Block Appt.	Case	Customer	Type	Status
03/26/2025		10:00 AM to 12:00 PM	1076882	ELODIA Golab		Rescheduled
03/27/2025	1:00 PM to 2:00 PM		1076882	Anuj Strawn	Cal-Learn Orientation	Scheduled

This Type 1 page took 0.48 seconds to load.

Figure 2.1.1 – Worker Schedule Search “Export to Excel” Mockup

2.1.3 Description of Changes

1. Add the Export icon to the pagination section of the Worker Schedule Search page.
 - a. Export icon will only display when there is result being returned on the 'Search Results Summary' section.
 - b. Clicking on the Export Icon will invoke CalSAWS to process the Worker Schedule Search Export Report in an Excel document.

Note: Export icon will display at the top and at the bottom of the 'Search Result Summary' section (this will match the Worker Schedule Search page).

2.1.4 Page Location

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

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

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

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Worker Schedule Search Export Report

2.2.1 Overview

The Worker Schedule Search Export Report will be available from the Worker Schedule Search page. The report provides a listing of the appointment information such as Worker ID, Unit ID, Date, Fixed Appt., Block Appt., Case, Category, Customer, Program, Type, Status, and Status Reason. This SCR will generate the Export Report in Excel.

2.2.2 Worker Schedule Search Export Report Mockup

General Information											
Report: Worker Schedule Export											
County: San Bernardino											
Run Date: 10/05/2024 10:38 AM											
Generated By: 90AS008000											
Worker ID: 90LS00CF00											
Office ID: CalSAWS Project Office											
Unit ID: 0000											

Figure 2.1.1 – General Information Tab

Worker ID	Unit ID	Date	Fixed Appt.	Block Appt.	Case	Customer	Category	Type	Program	Status	Status Reason
90LS00CF00	0000	03/01/2025	1:00 PM to 2:00 PM		2967807	Jane Bell	Cal-Learn	Cal-Learn Orientation	Cal-Fresh	No Show	
90LS00CF00	0000	03/02/2025		9:30 AM to 10:00 AM	2269246	Kory Bory	Home Visit		CalWORKs	Showed	
90LS00CF00	0000	03/03/2025	4:00 PM to 5:00 PM		2970462	Test Bowling	GROW	GROW Hearing	GAGR ES/GROW	Completed	
90LS00CF00	0000	03/30/2025	9:30 AM to 12:00 PM		3413457	Friend Chandler	General Appointment	Client Requested	Other	Scheduled	Worker Initiated
90LS00CF00	0000	04/05/2025		10:00 AM to 1:00 PM	3382038	Donald Cardenas	GA/GR Intake Interview		GA/GR	Rescheduled	Interrupted

Figure 2.2.1 – Exported Data Tab

2.2.3 Description of Changes

1. Generate an export report in excel for the Worker Schedule Search that will have the following:
 1. General Information Sheet

This sheet will contain general information including the parameters that were used to generate the Report. This sheet will include a single table with a single column titled "General Information" that will include the following rows:

 - i. Report Name formatted as "Report: Worker Schedule Export"
 - ii. The county name formatted as "County: <County Name>". For example: "County: San Bernardino".
 1. This is the County that the user is logged into.

- iii. The date and time the report was generated formatted as "Run Date: <mm/dd/yyyy hh:mm AM/PM>". For example: "Run Date: 08/05/2021 10:38 AM".
- iv. The Generated By formatted as "Generated By: <Worker ID>". For Example: "Generated By: 90AS008000".
 - 1. The Worker ID will be the ID of the user that generates the report of the Worker Schedule Search page.
- v. The Worker ID formatted as "Worker ID: <Worker ID>". For Example: "Worker ID: 90LS00CF00".
 - 1. The Worker ID will be the ID that is selected on the Worker Schedule Search page when the report is generated.
- vi. The Office ID formatted as "Office ID: <Office ID>". For Example: "Office ID: CalSAWS Project Office".
 - 1. This is the Office name of the Worker ID that is selected on the Worker Schedule Search page when the report is generated.
- vii. The Unit ID formatted as "Unit ID: <Unit ID>". For Example: "Unit ID: 0000".
 - 1. This is the Unit ID of the Worker ID that is selected on the Worker Schedule Search page when the report is generated.

2. Exported Data Sheet

This sheet provides a listing of Worker Schedule information such as the Worker ID, Unit ID, Date, Fixed Appt., Block Appt., Case, Customer, Category, Type, Program, Status, and Status Reason.

Column Name	Description
Worker ID	This column will display the Worker ID of the worker who is selected on the Worker Schedule Search page.
Unit ID	This column will display the Unit ID of the worker who is selected on the Worker Schedule Search page.
Date	This column will display the Date of the appointment formatted as "<mm/dd/yyyy>".
Fixed Appt.	This column will display the fixed time frame of the appointment formatted as "<Begin Time> to <End Time>". Note: If there is no Fixed Appt. applicable, it will display as "blank" on the report.
Block Appt.	This column will display the block time frame of the appointment formatted as "<Begin Time> to <End Time>". Note: If there is no Block Appt. applicable, it will display as "blank" on the report.

Column Name	Description
Case	This column will display the Case Number for the appointment that is assigned to the Worker ID on the search parameter.
Customer	<p>This column will display the Name of the Customer for the appointment formatted as "<First Name> <Last Name>".</p> <p>Note: If there are multiple Customers applicable, it will be formatted as "<Person #1 First Name> <Person #1 Last Name>, <Person #2 First Name><Person #2 Last Name>, etc.".</p>
Category	This column will display the Category of the appointment.
Type	<p>This column will display the Appointment-Type of the appointment.</p> <p>Note: If there is no Appointment-Type applicable, it will display as "blank" on the report.</p>
Program	This column will display the Program of the appointment.
Status	This column will display the Status of the appointment.
Status Reason	<p>This column will display the Status Reason of the appointment.</p> <p>Note: If there is no Status Reason applicable, it will display as "blank" on the report.</p>

2.2.4 Page Location

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

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

N/A

2.2.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1.0	Report	Worker Schedule Search Export Report - Mockup	Worker Schedule Search Export Report – Mockup.xlsx

4 OUTREACH

N/A

5 APPENDIX

N/A



Design

DOCUMENT APPROVAL HISTORY

Prepared By	Supritha Sundaram
Reviewed By	

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
4/10/2025	1.0	Initial Revision	Supritha Sundaram

Table of Contents

1 OVERVIEW	1
1.1 Current Design	1
1.2 Requests	1
1.3 Overview of Recommendations	1
1.4 Assumptions	2
2 RECOMMENDATIONS	2
2.1 MEDS EW20	2
2.2 [Eligibility Rules Updates] – No Impact	4
2.3 Batch Name	4
2.4 Interface	5
2.5 [eHIT] – No Impact	5
2.6 [Form/NOA Name] – No Impact	5
2.7 [Report Name] – No Impact	5
2.8 [Data Warehouse Name] – No Impact	5
2.9 [Data Change] – No Impact	5
2.10 [Automated Regression Test] – No Impact	5
3 SUPPORTING DOCUMENTS	5
4 OUTREACH	6
4.1 Lists	6
5 APPENDIX	6

CA-285746 Add Timeframe for Lookback Period for ICT Images

1 OVERVIEW

Establish a look back period of 36 months for ICT images to limit the number of images sent

1.1 Current Design

There is no look-back period for images sent in an ICT and too many images are sent to the receiving county. Because there is no specified look-back period, images are sent from many years before that no longer apply to the case. The excess images require that staff manually filter through the images to find the relevant images, which can be difficult to find.

1.2 Requests

Request look-back periods to be established based on the image type and/or ICT Outboard Category. Imaging committee will reach out to all applicable program committees to ask that each committee decide the necessary lookback periods.

If there is no response from the program committee, the suggestion is to limit the Images to those with a "Received Date" within the last 36 months. With exception for the following categories, which would send all documents:

- OP/OIs
- IPV information
- Time limit documents
- SIU/Court/Hearings
- Person verifications
- Authorized Representative
- SAWS 1
- SAWS 2 Plus

1.3 Overview of Recommendations

Limit sending ICT image look-back periods to be within the last 36 months. Except for the following categories, which would send all documents:

- OP/OIs
- IPV information
- Time limit documents
- SIU/Court/Hearings
- Person verifications
- Authorized Representative

- SAWS 1
- SAWS 2 Plus

1.4 Assumptions

No other functional changes

2 RECOMMENDATIONS

2.1 Update ICT Image Transfer

.1 Overview

Establish a look back period of 36 months for ICT images to limit the number of images sent.

.1 Description of Change

1. Establish two lists
 - a. A list based on these eight categories
 - OP/OIs
 - IPV information
 - Time limit documents
 - SIU/Court/Hearings
 - Person verifications
 - Authorized Representative
 - SAWS 1
 - SAWS 2 Plus

Establish a list of documents that should not have restricted lookback periods and return all results for these documents. Please see supporting documents for list of these forms.

- b. Apart from above list, the rest of the documents should be filtered out by received Date of the document to only past 36 months from the date the ICT was initiated.

.1 Partner Integration Testing

No.

.1 Execution Frequency

No Change.

.1 Key Scheduling Dependencies

No Change.

.1 Counties Impacted

All Counties.

.1 Category

Core-Off Prime.

.1 Data Volume/Performance

N/A.

.1 Interface Partner

N/A.

.1 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 [Eligibility Rules Updates] – No Impact

2.3 PB00C101

2.3.1 Overview

Update PB00C101 job to limit the look back period of images sent in ICT

2.3.2 Description of Change

Update PB00C101 job to limit the look back period of images sent in ICT

1. Based on the list of documents provided in supporting documents called CA-285746 Eict Mappings Skip Lookback.xlsx, create a table of these form names. When we search Hyland documents, filter out the results according to this table.

2. If the form in search results exist in this table, do not filter out results

3. If the form doesn't exist in this table, filter out the Hyland search results by received date variable and return only matching documents from past 36 months.

2.3.3 Partner Integration Testing

No.

2.3.4 Execution Frequency

No Change.

2.3.5 Key Scheduling Dependencies

No Change.

2.3.6 Counties Impacted

All Counties.

2.3.7 Category

Core-Off Prime.

2.3.8 Data Volume/Performance

N/A.

2.3.9 Interface Partner

MEDS.

2.3.10 Failure Procedure/Operational Instructions

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

2.4 Interface

2.5 [eHIT] – No Impact

2.6 [Form/NOA Name] – No Impact

2.7 [Report Name] – No Impact

2.8 [Data Warehouse Name] – No Impact

2.9 New table with documents

2.9.1 Overview

Create new table with list of form names that should be excluded from lookback period filtering.

2.9.2 Description of Change

Based on the list of documents provided in supporting documents called CA-285746 Eict Mappings Skip Lookback.xlsx, create a table of these form names. There are two sheets in the document, one listing documents from DOC_TEMPL_IMG table, the other from DOC_TEMPL table. Both should be combined into one list

2.10 [Automated Regression Test] – No Impact

3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	EICT	CA-285746 Eict Mappings Skip Lookback.xlsx	CA-285746 Eict Mappings Skip Lookback.xlsx

4 OUTREACH

4.1 Lists

5 APPENDIX



California Statewide Automated Welfare System

Design

CA-288548

Update Applicant IEVS Request to Include
Mandatory Case Members and Trigger AP 18 for
Relevant Cases in Support of Ex Parte Review

DOCUMENT APPROVAL HISTORY

Prepared By

Yuga Teja and Erika Kusnadi-Cerezo

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
05/21/2025	1.0	Initial	Kusnadi.E & Teja.Y

Table of Contents

1	OVERVIEW	1
1.1	Current Design	1
1.2	Requests	1
1.3	Overview of Recommendations	1
1.4	Assumptions.....	1
2	RECOMMENDATIONS	2
2.1	[Page Name]	Error! Bookmark not defined.
2.2	[Eligibility Rules Updates]	5
2.3	[Batch Name]	5
2.4	[Interface Name]	Error! Bookmark not defined.
2.5	[eHIT]	Error! Bookmark not defined.
2.6	[Form/NOA Name]	Error! Bookmark not defined.
2.7	[Report Name]	Error! Bookmark not defined.
2.8	[Data Warehouse Name]	Error! Bookmark not defined.
2.9	[Data Change]	Error! Bookmark not defined.
2.10	[Automated Regression Test]	Error! Bookmark not defined.
3	SUPPORTING DOCUMENTS	6
4	OUTREACH	6
4.1	Lists	Error! Bookmark not defined.
5	APPENDIX.....	6

CA-288548 – Update Applicant IEVS Request to Include Mandatory Case Members and Trigger AP 18 for Relevant Cases in Support of Ex Parte Review

1 OVERVIEW

1.1 Current Design

Currently, users are unable to request Applicant IEVS for individuals who do not have an Active/Pending Role status. This limitation creates challenges in scenarios where a parent, who is IE to MAGI (APTC eligible) but has been determined to have a Denied status, an Applicant IEVS needs to be requested for an ex-parte review. This review is essential for determining the eligibility of other "Case Members", particularly when the Denied Case Member's income plays a role in the eligibility determination for those other members.

1.2 Requests

Allow the manual request of Applicant IEVS for individuals that are on a Pending or Active Program regardless of their status within the program.

1.3 Overview of Recommendations

1. Update the IEVS Request List page to allow users to request AVP, IEVS, AVP and IEVS for applicants that are on a Pending or Active Program.
2. Update AP18 MEDS transaction trigger conditions to include applicants that are on Pending or Active program regardless of person status when users request AVP, IEVS, AVP and IEVS manually from IEVS request page (example provided in section 2.4.2)

1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. AP18 trigger conditions should be same as existing for SAVE related requests (SAVE and IEVS , SAVE and IEVS and AVP).
3. No change to the other AP18 transaction PO00EM400 trigger logic.

2 RECOMMENDATIONS

2.1 IEVS Request List

2.1.1 Overview

The IEVS Request List page list Asset Verification Request by Case Number and allows users to submit Income Eligibility Verification System (IEVS) requests for Applicants on a Case. Currently, users can make a request only for applicants with a Pending or Active status only on a Pending or Active program within the Case. This SCR will update the logic to allow users to request AVP (Asset Verification Program) and IEVS (Income Eligibility Verification System) for all applicants on a Pending or Active program regardless of their status within the program.

2.1.2 IEVS Request List Mockup

IEVS Request List Close

* - Indicates required fields

Display From: To: View

Search Results Summary Results 1 - 1 of 1

Applicant Name	SSN	DOB	Request Type	AVP Request Type	Request Date	Worker ID
48F	9	76	IEVS		11/01/2022	36LS48EZ0B

Request Type: * Name: * Request Close

This Type 1 page took

Figure 2.1.1 – IEVS Request List (Reference only)

2.1.3 Description of Changes

1. Update the IEVS Request List page to populate the list of applicants on the Name field based on the option selected on the Request Type field.
 - a. Options to be listed on the Name drop-down field will be based on the option selected on the Request Type drop-down field.
 - i. Request Type: <Blank>

1. The Name drop-down field will only have <Blank> as an option.
- ii. Request Type: AVP, IEVS, or IEVS and AVP
 1. The Name drop-down field will have the following options:
 - a. <Blank> (default) followed by a list of applicants that are on a Pending or Active program for the Case in alphabetical order by last name.
 - i. For applicants that are on multiple programs with the status of Pending or Active, their name will only be listed once on the drop-down field.
 - ii. The list of applicant names will continue to be displayed in the same format as what is in production currently (<Last Name>, <First Name> <Age> <Gender>).
 1. Example: Doe, John 50M
- iii. Request Type: IEVS and SAVE or IEVS and SAVE and AVP
 - a. <Blank> (default) followed by a list of applicants that are on a Pending or Active program within the Case and have a status of Pending or Active within program in alphabetical order by last name.

Note: List of applicants will use the existing logic for the Name field.

 - i. For applicants that are on multiple programs with the status of Pending or Active within the Case and have a status of Pending or Active within the program, their name will only be listed once on the drop-down field.
 - ii. The list of applicant names will continue to be displayed in the same format as what is in production currently (<Last Name>, <First Name> <Age> <Gender>).
 1. Example: Doe, John 50M
 - b. When the option selected on the Request Type field is changed, the option on the Name field will also change automatically to the default value (<Blank>).
 - i. Example: User selected the option of AVP from the Request Type field and selected the option of Doe, John 50M on the Name field. When the user changes the option from AVP to IEVS on the Request Type field, the Name field will automatically change the selected option to <Blank> (the default value for the Name field is <Blank>).

2.1.4 Page Location

- **Global: Eligibility**

- **Local: Customer Information**
- **Task: Financial → IEVS**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

The following Accessibility updates is needed:

- Table header text should not be empty

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 [Eligibility Rules Updates] – No Impact

2.3 [Batch Name] – No Impact

2.4 MEDS INTERFACE

2.4.1 Overview

Currently, AP18 is being triggered for following conditions

- Applicants with pending program status and Pending person status for below programs
 - MC', 'CW', 'FC', 'KG', 'AA', 'RC', 'CP', 'FS', 'GA', 'GR', 'GM', 'NB'
- Applicants with active program status and Active person status for the below programs
 - MC', 'GA', 'GR', 'GM'.

2.4.2 Description of Change

Update MEDS AP18 batch job PO00EM424 transaction trigger logic to include following conditions when user requests **IEVS only, IEVS AND AVP, AVP only manually from IEVS REQUEST PAGE as shown 2.1.2 section.**

- Applicants with pending program status for below programs
 - MC', 'CW', 'FC', 'KG', 'AA', 'RC', 'CP', 'FS', 'GA', 'GR', 'GM', 'NB'
- Applicants with active program status for the below programs
 - MC', 'GA', 'GR', 'GM'.

Technical Note: exclude person status (PGM_PERS_DETL STAT_CODE) value for mentioned programs for following manual request types **IEVS only, IEVS AND AVP, AVP only**

Example:

- **Scenario1:** For applicant with Active program and having denied/discontinued person status, user request IEVS and AVP via online manually.
 - **Outcome:** AP18 should be triggered for the applicant.
- **Scenario 2:** For applicant with Active program and having denied/discontinued person status, user request **IEVS with SAVE** via online manually (However, Online changes should not allow).
 - **Outcome:** AP18 should not be triggered.

2.4.3 Partner Integration Testing

NA

2.4.4 Execution Frequency

High-frequency cyclic (Daily)

2.4.5 Key Scheduling Dependencies

N/A

2.4.6 Counties Impacted

All

2.4.7 Category

Core-off prime

2.4.8 Data Volume/Performance

N/A

2.4.9 Interface Partner

MEDS.

2.4.10 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

N/A

4 OUTREACH

N/A

5 APPENDIX

N/A



Design

Design Document

CA-290936 ACL 25-37 - Changes to Vehicle Limits for CW

06/04/2025

DOCUMENT APPROVAL HISTORY

Owner	Satish Kumar
Preparer	Satish Kumar
Reviewer	Business Analyst
Approver	Sarah Rich

APPROVAL DATE	APPROVED VERSION	REVIEWED AND APPROVED BY	AUTHOR

Table of Contents

1	OVERVIEW	4
1.1	Current Design	4
1.2	Requests	4
1.3	Overview of Recommendations	4
1.4	Assumptions.....	5
2	RECOMMENDATIONS	5
2.1	Page Name	5
2.1.1	Overview	5
2.1.2	Page Name Mockup	5
2.1.3	Description of Changes	5
2.1.4	Page Location	5
2.1.5	Security Updates	5
2.1.6	Page Mapping	5
2.1.7	Accessibility.....	6
2.1.8	Page Usage/Data Volume Impacts	6
2.2	CW/RCA EDBC: Motor Vehicle Disregard.....	6
2.2.1	Overview	6
2.2.2	Description of Changes	6
2.2.3	Example Scenarios	6
2.2.4	Programs Impacted	6
2.2.5	Performance Impacts	6
2.3	Regression Test Impacted CalWORKs Forms Variable Population.....	7
2.3.1	Overview	7
2.3.2	Description of Change	7
2.4	Report Name.....	8
2.4.1	Overview	8
2.4.2	[Report Name] Mockup	8
2.4.3	Description of Change	8
2.4.4	Report Location.....	8
2.4.5	Counties Impacted.....	8
2.4.6	Security Updates	8
2.4.7	Report Usage/Performance	8
2.5	Data Warehouse Name	9
2.5.1	Overview	9
2.5.2	Report and Data Level Security	9
2.5.3	ETL Dependencies.....	9

2.5.4	Dashboard Standards.....	9
2.5.5	Metric Definition	9
2.5.6	Dashboard Name	9
2.5.7	Data Volume/Usage/Performance	9
2.6	Data Change.....	10
2.6.1	Overview.....	10
2.6.2	Description of Change	10
2.6.3	Estimated Number of Records Impacted/Performance	10
2.7	Automated Regression Test	10
2.7.1	Overview.....	10
2.7.2	Description of Change	10
3	SUPPORTING DOCUMENT	11
4	OUTREACH	11
4.1	Lists	11
5	APPENDIX.....	12

CA-290936 ACL 25-37 - Changes to Vehicle Limits for CW

1 OVERVIEW

This document identifies required changes to CalSAWS related to the vehicle limits for the CalWORKs (CW) and Refugee Cash Assistance (RCA) programs effective July 1, 2025, as informed by the All-County Letter (ACL) 25-37.

Effective July 1, 2025, the maximum value allowed for non-exempt vehicles will increase by **1.61 percent**, per the increase reflected in the CPI-U.

The new maximum non-exempt vehicle value limit will be **\$33,499**.

The equity value for each motor vehicle more than \$33,499 will be counted towards the maximum asset limit for CalWORKs, for applicant and recipient cases.

1.1 Current Design

Per ACL 24-36 effective July 1, 2024, the maximum non-exempt vehicle value limit increased by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2024) to the following value:

- The vehicle equity disregard value is \$32,968.

1.2 Requests

Per ACL 25-37 effective July 1, 2025, the maximum non-exempt vehicle value limit will increase by an amount equal to the increase in the California Necessities Index for the most recent fiscal year (2025) to the following value:

- The vehicle equity disregard will be increased from **\$32,968 to \$33,499**.

1.3 Overview of Recommendations

1. Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit.
2. Regression test impacted NOAs and Forms that populate the CalWORKs Motor Vehicle Disregard.

1.4 Assumptions

1. Vehicle property limits will reflect the new values on impacted NOAs and Forms.

2 RECOMMENDATIONS

2.1 Page Name

2.1.1 Overview

N/A

2.1.2 Page Name Mockup

N/A

2.1.3 Description of Changes

N/A

2.1.4 Page Location

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

2.1.5 Security Updates

1. Security Rights

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A		

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A		

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

N/A

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 CW/RCA EDBC: Motor Vehicle Disregard

2.2.1 Overview

Update CW/RCA EDBC rules that apply vehicle property limit amounts for Motor Vehicle Disregard to perform calculations based on the new limit effective July 1, 2025

2.2.2 Description of Changes

1. Effective July 1, 2025, the disregard will be increased from **\$32,968 to \$33,499. (CT 335-AO CW Motor Vehicle Disregard)**. Any amount more than the disregard will be counted against the AU's property limit.

2.2.3 Example Scenarios

N/A

2.2.4 Programs Impacted

CW , RCA

2.2.5 Performance Impacts

N/A

2.3 Regression Test Impacted CalWORKs Forms Variable Population

2.3.1 Overview

CalSAWS has Forms and Packets that auto-populate the motor vehicle disregard for CalWORKs.

Impacted Forms and Packets:

- SAWS 2A SAR
- CW RE Packet (non-LA County version)
- CW/CF RE Packet (non-LA County version).

2.3.2 Description of Change

Regression tests the following Forms and Packets to verify that the correct motor vehicle disregard is populating for CalWORKs.

Note: The motor vehicle disregard variable is referenced below as LIMIT_VD.

FORM	VARIABLE	LANGUAGE
SAWS 2A SAR (ID 5399)	Located on Page 9: "There is a \$<LIMIT> limit on the value of the property (e.g. bank accounts, stocks, etc.) that your family can own and be eligible to receive CalWORKs benefits. If someone in your family is at least 60 years of age or disabled, the limit is \$<LIMIT2>. Your residence and furniture are not part of the limit. You can own a vehicle (for example a car, truck, van, motorcycle, etc.) as long as what it's worth minus what you owe is less than \$<LIMIT_VD> . If it was given to you as a gift, a donation, or a family member transferred it to you, we do not count it. You will be asked to give the County proof from the Department of Motor Vehicles that it was a gift, donation or transfer from a family member. The vehicle will not count if used by your family for certain special reasons. Ask your worker what those reasons are. Your worker can explain to you how to figure the value of any vehicle."	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI
CW RE Packet (ID 6543)	Located on Page 17 within identical verbiage as above.	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI
CW/CF RE Packet (ID 6544)	Located on Page 17 within identical verbiage as above.	AE, AR, CA, CH, EN, FA, HM, KO, LA, RU, SP, TG, VI

2.4 Report Name

2.4.1 Overview

N/A

2.4.2 [Report Name] Mockup

N/A

2.4.3 Description of Change

N/A

2.4.4 Report Location

- **Global:**
- **Local:**
- **Task:**

2.4.5 Counties Impacted

N/A

2.4.6 Security Updates

1. Security Rights

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A		

2. Security Groups

SECURITY GROUP	GROUP DESCRIPTION	GROUP TO ROLE MAPPING
N/A		

2.4.7 Report Usage/Performance

N/A

2.5 Data Warehouse Name

2.5.1 Overview

N/A

2.5.2 Report and Data Level Security

N/A

2.5.3 ETL Dependencies

N/A

2.5.4 Dashboard Standards

N/A

2.5.5 Metric Definition

[Define any metrics used within the dashboard.]

METRIC NAME	METRIC DEFINITION	RELATED WIDGET
N/A		

2.5.6 Dashboard Name

N/A

2.5.7 Data Volume/Usage/Performance

N/A

2.6 Data Change

2.6.1 Overview

N/A

2.6.2 Description of Change

N/A

2.6.3 Estimated Number of Records Impacted/Performance

N/A

2.7 Automated Regression Test

2.7.1 Overview

Update the impacted ART scripts with the new vehicle values

2.7.2 Description of Change

Update the following scripts with the new values.

- CW – Property – Motor Vehicles
- CW, DV – Property – Motor Vehicles
- CW, HP – Property – Motor Vehicles
- CW, HT – Property – Motor Vehicles
- CW, IN – Property – Motor Vehicles
- RCA – Property – Motor Vehicles

3 SUPPORTING DOCUMENT

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
N/A			

4 OUTREACH

4.1 Lists

A list of CW cases will be provided where the vehicle property failed for the previous vehicle property limit amount, but the vehicle property passes for the current vehicle property limit amount for Motor Vehicle Disregard for the benefit month of 07/2025 and 08/2025.

List Name: List_of_CW_Cases_Where_Motor_Vehicle_Disregard_Failed

List Criteria: Provide a list of CW cases where the vehicle property failed for the previous vehicle property limit amount, but the vehicle property passes for the current vehicle property limit amount for Motor Vehicle Disregard for the benefit month of 07/2025 and 08/2025.

Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s): Benefit Month

Frequency: One-time

The list will be posted to the following locations:

SYSTEM	PATH
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>2025>CA-290936

5 APPENDIX