



California Statewide Automated Welfare System



## CA-236475 Add New Time Limit Budgets to NOAs Per ACL 21-45

[Date]

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Jose Gonzales	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
01-31-2025	1.0	Initial Draft	Jose Gonzales
03-26-2025	1.1	Added clarification to Recommendation 2.1.3	Jose Gonzales
5-27-2025	1.2	Added threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hindi, Hmong, Japanese, Korean, Lao, Mien, Russian, Tagalog, Thai, Ukrainian, and Vietnamese	Jose Gonzales

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>3</b>
1.1	Current Design .....	3
1.2	Requests .....	3
1.3	Overview of Recommendations .....	3
1.4	Assumptions.....	3
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>4</b>
2.1	Add NOA Budget NA 531 (7/21) to 60 Time Limit NOAs .....	4
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>6</b>

# CA-236475 Add New Time Limit Budgets to NOAs Per ACL 21-45

## 1 OVERVIEW

This SCR will add the NA 531 to NOAs M40-107F1, M40-107F2, M40-107J, M40-107J1 and M40-107K replacing the NA 1239 SAR (8/21) for automated NOAs.

### 1.1 Current Design

Currently automated NOAs M40-107F1, M40-107F2, M40-107J, M40-107J1 and M40-107K generate with the NA 1239 SAR (8/21).

### 1.2 Requests

Add budget NA 531 to the Time Limit NOAs that generate via EDBC.

### 1.3 Overview of Recommendations

Add budget NA 531 to the Time Limit NOAs that generate via EDBC.

### 1.4 Assumptions

- Budget NA 531 (7/21) was added to the Template Repository with SCR CA-241334 in English and Spanish.
- SCR CA-271084 will update the budget to NA 532 for NOA M40-107G.
- NA 531 only counts "Exempt Months" in the Exempt Month section and will not include "Don't Count" months.
- Snippet ids 9587, 9596, 9597, 9598, 9599 currently do not have reason thresholds for Thai. The budget for these snippets will not be updated with this SCR.

## 2 RECOMMENDATIONS

### 2.1 Add NOA Budget NA 531 (7/21) to 60-Time Limit NOAs

#### 2.1.1 Overview

Add the NA 531 (7/21) budget to 60-Time Limit NOAs

**State Form/NOA:**

NA 530/M40-107F1

NA 530/M40-107F2

NA 530/M40-107J

NA 530/M40-107J1

NA 530/M40-107K

**NOA Template ID(s):** CW\_TL\_60\_NOA\_TEMPLATE (3044)

**Budget Name:** NA 531 (7/21)

**Program(s):** CalWORKs

**Action Type:** Change

**Fragment Level:** Program

**Repeatable:** No

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

#### 2.1.2 Form/NOA Verbiage

N/A - NA 531 (7/21) already exists in the system in English and Spanish.  
See Supporting Documents #2 for English and #3 for Spanish version.

Note: Snippet ids 9587, 9596, 9597, 9598, 9599 currently do not have reason thresholds for Thai. The budget for these snippets will not be updated with this SCR.

#### 2.1.3 Form/NOA Variable Population

**Add Fragment Variable Population**

All the variable population from NA 1239 SAR (8/21) directly transfer to the NA 531 (7/21) expect for the Current Cash Aid Amount(Variable #12 in Section B) which has been omitted from the NA 531. The Exempt Months section is a new section on the NA 531

Note 1: If a CalWORKs month status is 'Exempt' the system will populate as 'Exempt Months' on the NA 531. The system will not populate 'Don't Count' months on the NA 531. If there are overlapping/multiple records for the same month/year the record being used for the clock count will be used to populate the NA 531. This SCR is targeted for 25.07, therefore the data in SCATL will be used to populate the NA 531.

Variable Name	Population	Formatting*
Multiple Variables	See supporting document #1 for the differences between the NA 1239 SAR and NA 531 and Threshold Languages	Arial 10

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

**Variables Requiring Translations:** None

Note 2: When we have more than two exempt years to list. This information will be auto populated by CalSAWS. The system will continue to auto-populate additional Exempt Month records on additional pages of the NA 531 if needed.

Note 3: The existing logic for how time limit variables populates in NOAs today will NOT be updated.

it will look like the following:

The following 23 months did not count toward your  
CalWORKs 60- month time limit:

2012 - Jul Aug Sep Oct Nov Dec  
2013 - Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov  
Dec  
2014 - Jan Feb Mar Apr  
2022 - Aug

## 2.1.4 Form/NOA Generation Conditions

---

### **Add Fragment Generation**

This fragment should generate and replace current budget NA 1239 SAR when the following NOAs are generated:

- NA 530/M40-107F1 NOA generates via EDBC with reason fragment (9585) CW\_CH\_TL\_60\_EXTEND\_TIME\_OUT\_PARTICIPANT\_A419.
- NA 530/M40-107F2 NOA generates via EDBC with reason fragment (9584) CW\_CH\_TL\_60\_EXTENDER\_END\_EXEMPTS\_NO\_CS\_A418.
- NA 530/M40-107J NOA generates via EDBC with reason fragment (9583) CW\_AP\_TL\_60\_PA\_EXEMPTS\_CS\_A417.
- NA 530/M40-107J1 NOAs generate via EDBC with reason fragments:  
(9587) CW\_AP\_TL\_60\_PARTICIPANT\_MET\_CONDITION\_A421  
(9596) CW\_AP\_TL\_60\_CS\_REPAID\_A423  
(9597) CW\_AP\_TL\_60\_OVERPAY\_REPAID\_APPROVED\_A424  
(9598) CW\_AP\_TL\_REPAID\_CS\_PRORATE\_APPROV\_AFTER\_60\_A425  
(9599) CW\_AP\_TL\_REPAID\_OVERPAY\_PRORATE\_AP\_AFTER\_60\_A426
- NA 530/M40-107K NOA generates via EDBC with reason fragment (9586) CW\_CH\_TL\_60\_EXEMPT\_CS\_OVRPAY\_INCR\_GRANT\_A420

**Location on NOA:** It should be added in the multi budget area of the NOA where NA 1239 SAR generates currently. NA 531 (7/21) will replace NA 1239 SAR (8/21).

### 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Budget	NA 531 and 1239 SAR Comparison & Threshold Languages	NA 531 and 1239 SAR Comparison & Threshold Languages.xlsx
2	Budget	NA531 ENGLISH	NA531_ENGLISH.pdf
3	Budget	NA531 SPANISH	NA531_SPANISH.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

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	2
1.4	Assumptions.....	3
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>3</b>
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
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>29</b>
<b>4</b>	<b>OUTREACH .....</b>	<b>29</b>
<b>5</b>	<b>APPENDIX.....</b>	<b>29</b>

# [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

<b>CODE_NUM _IDENTIF</b>	<b>SHORT_DECODE_NAME</b>	<b>LONG_DECODE_NAME</b>
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	<b>Your CalFresh will stop because you did not:</b>	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 &lt;CountyPhoneNumber&gt;.</p> <p><b>How to Keep Your CalFresh</b></p> <p>By &lt;CountyContactDate&gt;, 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"><li>• Younger than age 16, or age 60 or older;</li></ul>	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

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-246797**

Update Direct Deposit Status Report to Extract  
Program Level instead of RDB



## DOCUMENT APPROVAL HISTORY

Prepared By

Susanna Martinez

Reviewed By

Gokul Suresh, Ravneet Bhatia

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

4/28/25

1

Initial Document

Susanna  
Martinez

04/28/25

1.1

Added assumption #1 per  
committee review request.Esequiel  
Herrera-Ortiz

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>2</b>
2.1	Direct Deposit Status Report .....	2
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>5</b>
<b>4</b>	<b>APPENDIX.....</b>	<b>6</b>

# CA-246797 – Update Direct Deposit Status Report to Extract Program Level instead of RDB

## 1 OVERVIEW

Since Direct Deposit accounts are managed at the Resource level, the system does not allow AAP/FC/KG providers to have individual Direct Deposit bank accounts for each individual child. SCR CA-236626 updated the system to manage AAP/FC/KG providers' Direct Deposit bank account on the program level. The Direct Deposit Status Report provides information on requests for Direct Deposit. The report needs to be updated to pull information from Program level instead of the RDB to capture this Direct Deposit information for but not limited to the AAP/FC/KG programs.

### 1.1 Current Design

The Direct Deposit Status Report provides information on Direct Deposit requests at the person level only from the Resource Data Bank (RDB) and does not pull information at the program level.

### 1.2 Requests

The Direct Deposit Status Report needs to be updated to also pull information from program level in addition to the person level information it is already capturing from the RDB.

### 1.3 Overview of Recommendations

1. Update the Direct Deposit Status Report to pull information at the program level in addition to the person level information it is already capturing from the RDB.
2. Rename the 'Payee Name' column to 'Payee/Org Name' in the report.

### 1.4 Assumptions

1. The report will now display account statuses (such as Prenote Submitted) for payees that are an organization or resource as available in CalSAWS.

## 2 RECOMMENDATIONS

### 2.1 Direct Deposit Status Report

#### 2.1.1 Overview

The Direct Deposit Status Report provides a list of requests for Direct Deposit for an organizational group. This is an On-Demand App Generated (ODAG) On-Request report, meaning it is a live report. This report will be updated to pull information from program level in addition to the person level information it is already capturing from the RDB.

#### 2.1.2 Direct Deposit Status Report Mockup

The screenshot displays the Qlik Direct Deposit Status Report interface. The top navigation bar includes the Qlik logo, 'Analytics Sheet', 'Hierarchy Storytelling', and the report title 'Direct Deposit Status Report'. Below this, the 'Report Filters' section is visible, showing the data date as '05/01/2025'. The main filter area is divided into several columns: County, Region, District, Department, and Account Status. Each column contains a list of options with search icons. To the right, there are date filters for 'Begin Date' and 'End Date'. At the bottom, there is a 'Reset' button and a message 'Please Select Required Fields \*'.

County *	Region	District	Department	Account Status *
Alameda	ADMIN	002 - Glendale	Administrative Services	Active
Alpine	All TWORKS Offices	003 - Pasadena	DCFS	All
Amador	AP	004 - El Monte	DPSS	Inactive
Butte	Bakersfield	005 - Belvedere	Eligibility Services	New
Calaveras	Central County	006 - Cudahy	Employment Services	Prenote Error
Colusa	CFS	007 - South Special	Family Services	Prenote Approved
Contra Costa	Child Welfare	008 - Southwest Special	Social Services	Prenote Submitted
Del Norte	Chowchilla	010 - Wilshire Special		
El Dorado	Countywide	011 - East Valley		
Fresno	Districts	012 - Exposition Park		
Glenn	East County	013 - Metro Family		
Humboldt	Eastern County	014 - Civic Center		
Imperial	Eastern Slope	015 - Metro East		
Inyo	Fiscal	016 - Child Medi-Cal Enroll. Project		
Kern	Fort Bragg	017 - Florence		
Kings	Foster Care	018 - DHS USC Medical Center		
Lake	FSS	020 - San Gabriel Valley		
Lassen	GP Admin	026 - Compton		
Los Angeles	Madera	027 - South Central		

Figure 2.1.2.1 – Direct Deposit Status Report – General Filters Sheet

**CalSAWS Report Filters**

Data as of: 05/01/2025

**General** **Office** **Unit**

**Office ID**

- 0A
- 0B
- 0C
- 0D
- 0E
- 0F
- 0G
- 0H
- 0I
- 0J
- 0K
- 0L
- 0M
- 0N
- 0O
- 0P
- 0Q
- 0R
- 0S

**Office Name**

- 1-Clovis Bldg 1
- 1-Clovis Bldg 2
- 1-Com Med Ctr Web
- 1-Commissary
- 1-Crocker
- 1-DA Web
- 1-DCSS Web
- 1-IHSS Web
- 1-Pub/Com Hlth Web
- 1-Web Users
- 1-RCS North Rgn
- 1-WTW North Rgn
- 1A-APS/Central
- 2-Clovis Bldg 1
- 2-Clovis Bldg 2
- 2-Clovis Bldg 3
- 2-Clovis Bldg 5
- 2-Service Center
- 2-Catholic Charities

**Office Type**

- Cal-Learn Office
- Centralized Office
- Child Care Office
- Customer Service Office
- District
- GROW Office
- Main
- Medical Center
- MSUDSP
- Outstation
- Regional
- REP Office
- Sub-Office
- WTW Office

**Begin Date \***

- 05/01/2025
- 04/30/2025
- 04/29/2025
- 04/28/2025
- 04/27/2025
- 04/26/2025
- 04/25/2025
- 04/24/2025
- 04/23/2025

**End Date \***

- 05/01/2025
- 04/30/2025
- 04/29/2025
- 04/28/2025
- 04/27/2025
- 04/26/2025
- 04/25/2025
- 04/24/2025
- 04/23/2025

**Reset** **Please Select Required Fields \***

**Figure 2.1.2.2 – Direct Deposit Status Report – Office Filters Sheet**

**CalSAWS Report Filters**

Data as of: 05/01/2025

**General** **Office** **Unit**

**Unit ID**

- 0A00
- 0B00
- 0C00
- 0D00
- 0E00
- 0F00
- 0G00
- 0H00
- 0I00
- 0J00
- 0K00
- 0L00
- 0M00
- 0N00
- 0O00
- 0P00
- 0Q00
- 0R00
- 0S00

**Unit Type**

- Administrative Support
- Blended Services
- Cal-Learn Services
- CalFresh
- CalWorks
- Case Management
- Child Care
- Collections
- Combination
- Community Services Dept.
- Continuing
- County Schools
- Dept of Aging & Adult Svcs
- Dept of Behavior Health
- Dept of Child Support Svcs
- Dept of Children's Svcs
- Family Maintenance
- Fiscal
- Foster Care

**Begin Date \***

- 05/01/2025
- 04/30/2025
- 04/29/2025
- 04/28/2025
- 04/27/2025
- 04/26/2025
- 04/25/2025
- 04/24/2025
- 04/23/2025

**End Date \***

- 05/01/2025
- 04/30/2025
- 04/29/2025
- 04/28/2025
- 04/27/2025
- 04/26/2025
- 04/25/2025
- 04/24/2025
- 04/23/2025

**Reset** **Please Select Required Fields \***

**Figure 2.1.2.3 – Direct Deposit Status Report – Unit Filters Sheet**

**CalSAWS Detail**

Data Extracted Daily As Of: 05/01/2025

County: San Bernardino

User: calsauser

**Status Summary**

STATUS	Total Count
Active	65
New	64
Inactive	16
Prenote Approved	64
Prenote Submitted	65

**Direct Deposit Status Detail**

Status	Routing Number	Account Number	Status Date	Begin Date	End Date	Bank	Case Number	Case Name	Payee Name	Worker ID	Olik ID

**Account Status**

Account Number	Status Date	Status

**Figure 2.1.2.4 – Direct Deposit Status Report – Detail Sheet Before Update of Payee Organization Name Column**

The screenshot shows the Qlik Direct Deposit Status Report interface. The top navigation bar includes 'Prepare Data manager', 'Analyze Sheet', and 'Narrate Storytelling'. The main header displays 'Direct Deposit Status Report'. Below this, filters for 'County: San Bernardino', 'From Date: 12/01/2023', and 'To Date: 12/01/2023' are shown. The 'User' is 'calsawsuser'. The 'Data Extracted Daily As Of' is '12/07/2023'. The 'Status Summary' table shows the following data:

STATUS	Total Count
New	33
Inactive	3
Prenote Approved	34
Prenote Submitted	34

The 'Direct Deposit Status Detail' table has the following columns: Status, Routing Number, Account Number, Status Date, Begin Date, End Date, Bank, Case Number, Case Name, Payee/Org Name (highlighted with a red box), Worker ID, and Qlik ID. The 'Payee/Org Name' column is currently empty.

**Figure 2.1.2.5 – Direct Deposit Status Report – Detail Sheet After Update of Payee Name Column**

## 2.1.3 Description of Change

1. Update the Direct Deposit Status Report to pull information at the program level in addition to the person level information it is already capturing from the RDB.
  - a. The current population the report is capturing at the person level from the RDB will remain in place. The new population of data that is captured at the program level will be in addition to the person level data already captured by the report logic.
    - i. The person level data logic already captured in the report will not be updated.

### Tech Notes:

- The new program level data logic will use the same base query as the current person level data, however the driver table for the query will use the ORG\_ACCT and ORG\_ACCT\_DETL tables to pull the program level population.
  - The person level base query currently uses the ACCT and ACCT\_DETL tables as its driver table and this will remain as is for this population.
  - The program level logic that will use the ORG\_ACCT and ORG\_ACCT\_DETL tables will be a UNION with the current query used to pull the person level population.
  - All existing columns and data points will be able to be derived from the joins of other data tables to the ORG\_ACCT and ORG\_ACCT\_DETL tables.
2. Rename the 'Payee Name' column to 'Payee/Org Name' in the report.
    - a. The logic capturing the person level data will continue to capture the Payee name value as is.
    - b. If the record is being captured at the program level i.e. the data coming from the query utilizing the organization account

source tables, it will capture the Payee name of the resource associated to the organization account.

- i. **Tech Note:** ORG.ORG\_NAME where ORG.ID = ORG\_ACCT.ORG\_ID

#### 2.1.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Fiscal**

#### 2.1.5 Counties Impacted

All counties will be impacted by these changes.

#### 2.1.6 Security Updates

##### 1. Security Rights

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


##### 2. Security Groups

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

#### 2.1.7 Report Usage/Performance

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

### 3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT
1	Reports	Direct Deposit Status Report Mockup	 Direct Deposit Status Report Mockup.docx

## 4 APPENDIX

N/A



# Design

## **CA-249686**

CAPI-Create A Monthly Integrated Report to  
Include County of Residence

## DOCUMENT APPROVAL HISTORY

Prepared By

TK Bui

Reviewed By

Esequiel Herrera-Ortiz, Claudia Pinto,  
Denise Barajas

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

5/5/2025

1.0

Initial document

TK Bui

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>2</b>
2.1	Page Updates — No Impact .....	2
2.2	Eligibility Rules Updates — No Impact.....	2
2.3	Batch Updates — No Impact .....	2
2.4	Interface Updates — No Impact.....	2
2.5	Ehit Updates — No Impact .....	2
2.6	Form/NOA Updates — No Impact .....	2
2.7	Integrated CAPI Issuance Detail Claiming Report (Multicounty) .....	2
2.8	Data Warehouse Updates — No Impact .....	8
2.9	Data Change — No Impact .....	8
2.10	Automated Regression Test — No Impact.....	8
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>8</b>
<b>4</b>	<b>OUTREACH .....</b>	<b>8</b>
4.1	Lists .....	8
<b>5</b>	<b>APPENDIX.....</b>	<b>9</b>

# CA-249686 – CAPI-Create A Monthly Integrated Report to Include County of Residence

## 1 OVERVIEW

Currently, there are Fiscal Integrated Claiming Reports which report on expenditures for the CAPI program. San Mateo and Sacramento counties manage the CAPI program for select counties, but the existing integrated claiming reports do not report on the county of residence where the case originates from. A monthly ad-hoc report which includes the county of residence of the case is currently provided to San Mateo.

With this SCR, the existing ad-hoc will be automated in the system as a new report called the "Integrated CAPI Issuance Detail Claiming Report (Multicounty)" to provide Sacramento and San Mateo a list of CAPI expenditures for the report month with the county of residence corresponding with the case.

### 1.1 Current Design

San Mateo and Sacramento counties each manage the CAPI program for several counties. The expenditures are claimed as San Mateo or Sacramento accordingly and the existing fiscal reports can be used. However, the counties also need a way to identify CAPI expenditures by each county that they manage.

### 1.2 Requests

Create a new monthly integrated claiming report that will include county of residence information.

### 1.3 Overview of Recommendations

1. Automate the existing ad-hoc as a new monthly integrated claiming report called the "Integrated CAPI Issuance Detail Claiming Report (Multicounty)" which will include county of residence information.

### 1.4 Assumptions

1. The existing integrated claiming reports will NOT be updated as part of this SCR.
2. After the new Integrated CAPI Issuance Detail Claiming Report (Multicounty) is put into production, the monthly ad-hoc will no longer be provided.

## 2 RECOMMENDATIONS

### 2.1 Page Updates — No Impact

### 2.2 Eligibility Rules Updates — No Impact

### 2.3 Batch Updates — No Impact

### 2.4 Interface Updates — No Impact

### 2.5 Ehit Updates — No Impact

### 2.6 Form/NOA Updates — No Impact

### 2.7 Integrated CAPI Issuance Detail Claiming Report (Multicounty)

#### 2.7.1 Overview

---

Currently, San Mateo and Sacramento each manage the CAPI program for several counties. These CAPI expenditures are claimed as either San Mateo or Sacramento within the existing integrated claiming reports. However, they are unable to identify these expenditures by each county that they manage. To identify the county of residence, CalSAWS currently provides a monthly claiming ad-hoc by county of residence to San Mateo.

The existing ad-hoc will be automated in the system as a new monthly fiscal integrated claiming report called the “Integrated CAPI Issuance Detail Claiming Report (Multicounty)” to provide San Mateo and Sacramento with the county of residence information for the claimed CAPI expenditures for the report month. The batch schedule for this new report will be the first business day of the month, and the report will be available on the second business day of the month.

#### 2.7.2 Integrated CAPI Issuance Detail Claiming Report (Multicounty) Mockup

---

CalSAWS Integrated CAPI Issuance Detail Claiming Report (Multicounty)

County Name

Run Date: MON 02-YY HH:MM AM/PM

Report Month: MM/YYYY

Details

Total:										4	1	3	3	0	0	7		\$200.00	\$80.00	\$0.00	\$280.00			
										Person Count														
										New Full														
										Fed										Other				
										A	C	A	C	A	C	A	C	FBI Count	Worker ID	Trans Date	Fed Amt.	Mtd Amt.	Other Amt.	Amount
Residence County	Case Number	Case Name	Payee Name	Control Number	Insurance Type	Issue Date	Transaction Type	Aid Code	Play Code	Benefit Month	A	C	A	C	A	C	FBI Count	Worker ID	Trans Date	Fed Amt.	Mtd Amt.	Other Amt.	Amount	
Alameda	5000001	Case Name	Payee Name	5000001	Direct Deposit	PRVDDVYYY	Supplemental Benefit Issuance	1A	HRVYYY	0	0	1	1	0	0	0	1	PRVDDVYYY	\$0.00	\$0.00	\$0.00	\$0.00		
Contra Costa	5000002	Case Name	Payee Name	5000002	EBT	PRVDDVYYY	Main Payroll Benefit Issuance	1A	HRVYYY	1	1	0	0	0	0	1	PRVDDVYYY	\$20.00	\$0.00	\$0.00	\$20.00			
Fresno	5000003	Case Name	Payee Name	5000003	Warrant	PRVDDVYYY	Benefit Issuance Adjustment	1A	HRVYYY	0	0	1	1	0	0	1	PRVDDVYYY	\$0.00	\$0.00	\$0.00	\$0.00			
Lake	5000004	Case Name	Payee Name	5000004	Direct Deposit	PRVDDVYYY	Supplemental Benefit Issuance	1A	HRVYYY	0	0	1	1	0	0	1	PRVDDVYYY	\$0.00	\$0.00	\$0.00	\$0.00			
Alameda	5000005	Case Name	Payee Name	5000005	EBT	PRVDDVYYY	Main Payroll Benefit Issuance	0B	HRVYYY	1	0	0	0	0	0	1	PRVDDVYYY	\$50.00	\$0.00	\$0.00	\$50.00			
Contra Costa	5000006	Case Name	Payee Name	5000006	Warrant	PRVDDVYYY	Benefit Issuance Adjustment	0B	HRVYYY	1	0	0	0	0	0	1	PRVDDVYYY	\$60.00	\$0.00	\$0.00	\$60.00			
Fresno	5000007	Case Name	Payee Name	5000007	Direct Deposit	PRVDDVYYY	Supplemental Benefit Issuance	0B	HRVYYY	1	0	0	0	0	0	1	PRVDDVYYY	\$70.00	\$0.00	\$0.00	\$70.00			

< > Details +

1 <<

**Figure 2.7.2.1 – Integrated CAPI Issuance Detail Claiming Report (Multicounty) Mockup**  
**Note:** The full report mockup is available in the Supporting Documents section.

## 2.7.3 Description of Change

- Create a new monthly scheduled fiscal report using the existing ad-hoc called the "Integrated CAPI Issuance Detail Claiming Report (Multicounty)" to report on claimed CAPI expenditures for the report month while reporting on the corresponding county of residence. This report will only be available to San Mateo and Sacramento, as they manage the CAPI program for select counties and need to be able to identify cases by the managed county. The batch schedule for this new report will be the first business day of the month, and the report will be available on the second business day of the month.
  - The base population of the Integrated CAPI Issuance Detail Claiming Report (Multicounty) is comprised of the following:
    - The program is **CP** – CAPI.
      - Technical Note:**
        - PGM.PGM\_CODE (CT-18)
        - CLAIM\_HIST.PGM\_CODE (CT-18)
    - The county on the claim is Sacramento or San Mateo.
      - Technical Note:** CLAIM\_HIST.COUNTY\_CODE (CT-15) is one of the following:
        - 34** – Sacramento
        - 41** – San Mateo
    - The reported county of residence corresponds to the primary applicant on the program at the end of the report month.
      - Technical Note:**
        - RES.COUNTY\_CODE (CT-15)
        - PGM\_ADMIN.ADMIN\_CODE is **PR** – Primary Applicant (CT-255).
        - The last day of RPT\_MONTH is between PGM\_ADMIN.BEG\_DATE and PGM\_ADMIN.END\_DATE.

- The first day of RPT\_MONTH is between RES.BEG\_DATE and RES.END\_DATE.
  - The transaction date occurs during the report month.
    - **Technical Note:** CLAIM\_HIST.TRANS\_DATE in RPT\_MONTH
- b. The columns in the report are as follows:
- Note:** Total counts are provided for the displayed records under the Person Count columns, the FBU count column, and the Amount columns.

Column Name	Column Definition
<b>Residence County</b>	<p>This column contains the county of residence of the primary applicant.</p> <p><b>Technical Note:</b> RES.COUNTY_CODE (CT-15)</p>
<b>Case Number</b>	<p>This column contains the case number.</p> <p><b>Technical Note:</b> CASE.SERIAL_NUM_IDENTIF</p>
<b>Case Name</b>	<p>This column contains the case name.</p> <p><b>Technical Note:</b> CASE.CASE_NAME</p>
<b>Payee Name</b>	<p>This column contains the payee name.</p> <p><b>Format:</b> [First Name] [Middle Name] [Last Name] [Suffix]</p> <p><b>Technical Note:</b> CLAIM_HIST.PAYEE_FIRST_NAME, CLAIM_HIST.PAYEE_MID_NAME, CLAIM_HIST.PAYEE_LAST_NAME, CLAIM_HIST.PAYEE_SUFFIX</p>
<b>Control Number</b>	<p>This column contains the identifying number of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.CTRL_NUM_IDENTIF</p>
<b>Issuance Type</b>	<p>This column contains the issuance type.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> <li>• Direct Deposit (<b>DD</b>)</li> <li>• EBT (<b>EB</b>)</li> <li>• Warrant (<b>WA</b>)</li> </ul> <p><b>Technical Note:</b> CLAIM_HIST.ISSUANCE_TYPE_CODE (CT-112)</p>

<b>Issue Date</b>	<p>This column contains the issue date.</p> <p><b>Format:</b> MM/DD/YYYY</p> <p><b>Technical Note:</b> CLAIM_HIST.ISSUE_DATE</p>
<b>Transaction Type</b>	<p>This column contains the transaction type.</p> <p>Possible Values (including, but not limited to):</p> <ul style="list-style-type: none"> <li>• Benefit Issuance Adjustment (<b>AJ</b>)</li> <li>• Cancellation of Benefit Issuance (<b>CN</b>)</li> <li>• Main Payroll Benefit Issuance (<b>MP</b>)</li> <li>• Receipted Collection (<b>RC</b>)</li> <li>• Recovery Account Refund (<b>RR</b>)</li> <li>• Supplemental Benefit Issuance (<b>SI</b>)</li> </ul> <p><b>Technical Note:</b> CLAIM_HIST.TRANS_TYPE_CODE (CT-420)</p>
<b>Aid Code</b>	<p>This column contains the aid code on the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.AID_CODE (CT-184)</p>
<b>Pay Code</b>	<p>This column contains the pay code on the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.PAY_CODE (CT-623)</p>
<b>Benefit Month</b>	<p>This column contains the benefit month on the issuance.</p> <p><b>Format:</b> MM/YYYY</p> <p><b>Technical Note:</b> CLAIM_HIST.BEN_MONTH</p>
<b>Person Count</b>	
<b>Fed</b>	
<b>A</b>	<p>This column contains the number of federally funded adults on the case at the time of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.FED_ADULT_QTY</p>



<b>C</b>	<p>This column contains the number of federally funded children on the case at the time of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.FED_CHILD_QTY</p>
<b>Non Fed</b>	
<b>A</b>	<p>This column contains the number of state or county funded adults on the case at the time of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.NON_FED_ADULT_QTY</p>
<b>C</b>	<p>This column contains the number of state or county funded children on the case at the time of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.NON_FED_CHILD_QTY</p>
<b>Other</b>	
<b>A</b>	<p>This column contains the number of non-state and non-federally funded adults on the case at the time of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.OTHER_ADULT_QTY</p>
<b>C</b>	<p>This column contains the number of non-state and non-federally funded children on the case at the time of the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.OTHER_CHILD_QTY</p>
<b>FBU Count</b>	<p>This column contains the Family Base Unit (FBU) count.</p> <p><b>Technical Note:</b> CLAIM_HIST.FBU_QTY</p>
<b>Worker ID</b>	<p>This column contains the identifying number of the worker associated with the issuance.</p> <p><b>Technical Note:</b> CLAIM_HIST.WRKR_NUM_IDENTIF</p>
<b>Trans Date</b>	<p>This column contains the transaction date, which must occur during the report month.</p>

	<b>Format:</b> MM/DD/YYYY <b>Technical Note:</b> CLAIM_HIST.TRANS_DATE
<b>Fed Amt.</b>	<p>This column contains the dollar amount of the total issuance amount that is federally claimed.</p> <p><b>Format:</b> \$XX.XX  <b>Technical Note:</b> CLAIM_HIST.FED_AMT</p>
<b>Nfed Amt.</b>	<p>This column contains the dollar amount of the total issuance amount that is claimed by the state.</p> <p><b>Format:</b> \$XX.XX  <b>Technical Note:</b> CLAIM_HIST.NON_FED_AMT</p>
<b>Other Amt.</b>	<p>This column contains the dollar amount of the total issuance amount that is not claimed by the state nor the federal government.</p> <p><b>Format:</b> \$XX.XX  <b>Technical Note:</b> CLAIM_HIST.OTHER_AMT</p>
<b>Amount</b>	<p>This column contains the total dollar amount across the Fed Amt., Nfed Amt., and Other Amt. columns.</p> <p><b>Format:</b> \$XX.XX  <b>Technical Note:</b> CLAIM_HIST.FED_AMT + CLAIM_HIST.NON_FED_AMT + CLAIM_HIST.OTHER_AMT</p>

#### 2.7.4 Report Location

- **Global:** Reports
- **Local:** Scheduled
- **Task:** Fiscal
- **Description:** Provides information on CAPI expenditures for the report month, including county of residence information.

#### 2.7.5 Counties Impacted

The changes outlined in this SCR will only affect San Mateo and Sacramento, as only these counties manage the CAPI program for other select counties.

#### 2.7.6 Security Updates

## 1. Security Rights

Security Right	Right Description	Right to Group Mapping
IntegratedCAPI IssuanceDetail ClaimingReport	Grants access to the Integrated CAPI Issuance Detail Claiming Report (Multicounty).	<ul style="list-style-type: none"><li>Integrated Claiming Reports</li><li>LRS Reports Access – Fiscal Reports</li></ul>

## 2. Security Groups

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

### 2.7.7 Report Usage/Performance



This report will be accessible to Sacramento and San Mateo counties only.

## 2.8 Data Warehouse Updates — No Impact

## 2.9 Data Change — No Impact

## 2.10 Automated Regression Test — No Impact

## 3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Integrated CAPI Issuance Detail Claiming Report (Multicounty) Mockup	 Integrated CAPI Issuance Detail Claimi
2	Reports	CA-249686 Security Matrix	 CA-249686 Security Matrix.xlsx

## 4 OUTREACH

### 4.1 Lists

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. 3. Add EBT 2216 to CW/CF RE Packet.	Lalitha Valamarthi

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>3</b>
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
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>10</b>
<b>4</b>	<b>OUTREACH .....</b>	<b>10</b>
<b>5</b>	<b>APPENDIX.....</b>	<b>10</b>

# 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
- EBT 2216
- 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

# CalSAWS

California Statewide Automated Welfare System



## CA-274303

Task Detail Automated Action field  
Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Vallari Bathala, William Baretsky	
	Reviewed By	Justin Dobbs, Sarah Rich, Dymas Pena, Carlos Albances	
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/10/2025	1.0	Initial Revision	Vallari Bathala, William Baretsky

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>2</b>
2.1	Task Pop-Up: Task Detail Page .....	2
2.1.1	Overview .....	2
2.1.2	Task Pop-Up: Task Detail Page Mockup .....	2
2.1.3	Description of Changes .....	2
2.1.4	Page Location .....	5
2.1.5	Security Updates .....	5
2.1.6	Page Mapping .....	6
2.1.7	Accessibility.....	6
2.1.8	Page Usage/Data Volume Impacts .....	6
2.2	Automated Regression Test .....	6
2.2.1	Overview .....	6
2.2.2	Description of Change .....	6
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>7</b>
<b>4</b>	<b>REQUIREMENTS.....</b>	<b>8</b>
4.1	Project Requirements .....	8
<b>5</b>	<b>OUTREACH .....</b>	<b>9</b>
<b>6</b>	<b>APPENDIX.....</b>	<b>10</b>

# CA-274303 – Task Detail Automated Action field Enhancements

## 1 OVERVIEW

This design outlines modifications to Task Management functionality to aid Users in identifying the origin of Tasks created within the CalSAWS System.

### 1.1 Current Design

Within the CalSAWS System, a Task can be created through various methods such as manual Task creation, Automated Actions, Document Routing Rules, etc. When a Task is created from an Automated Action, the 'Automated Action' attribute in the Task Detail Pop-Up page displays "Yes" or "No" indicating if the Task originated from an Automated Action. If the attribute displays 'Yes', then a hover-over tool tip provides additional information regarding the Automated Action which created the Task. There is no tool tip if the attribute displays "No".

Currently, there is no functionality available on the Task Detail page for Counties to identify additional information if the source of the Task is anything other than an Automated Action.

### 1.2 Requests

1. Add additional information pertaining to the source which created a Task.

### 1.3 Overview of Recommendations

1. Update the Task Pop-Up: Task Detail page to include the details of the source which created a Task.

### 1.4 Assumptions

N/A

## 2 RECOMMENDATIONS

This section will outline recommendations to update the 'Automated Action' attribute tool tip functionality within the CalSAWS System.

### 2.1 Task Pop-Up: Task Detail Page

#### 2.1.1 Overview

This section describes recommendations to update the tool tip displayed upon mouse hover over of the 'Automated Action' attribute in the Task Detail page.

#### 2.1.2 Task Pop-Up: Task Detail Page Mockup

Task Detail

Result 1 of 1 - 1

Help

\*- Indicates required fields

Task ID: 1204746513

Re-OpenPrintClose

Case Number <a href="#">8910111</a>	Case Name: Case Name	Program(s): * Medi-Cal - JAKE DOE	Status: * Assigned	Reference Number:
Category: * Case Update	Type: * Pending PVS Abstract	Sub-Type:	Priority: Critical	Expedited:
Due Date: * 11/21/2024	Date Created: 11/02/2024	Worker Assigned Date: 11/02/2024	Date Completed:	Start Date:
Assign to Program Worker: No	Worker ID: <a href="#">00DP10100T</a>	Bank ID:	Source: <a href="#">MEDS Alert</a>	

Long Description:

MEDS Alert Details

ID: 9003

Description: DEATH REPORTED TO MEDS-MEDS/CDB ELIGIBILITY TERMINATED

Type: URGENT

Instructions

Task History

Task Time Record

Re-OpenPrintClose

Created On 11/02/2024 1:45:44 AM By: [593497](#)  
Last Updated On 11/12/2024 12:11:51 PM By: [997663](#)

Figure 2.1.2 – Task Detail Page Source Hover Box

#### 2.1.3 Description of Changes

1. Rename the 'Automated Action' attribute to 'Source'.
2. Update the "Yes" and "No" options to display the following originating sources:
  - a. Automated Action
    - i. The Source will reflect "Automated Action" when the Task was created as a result of processing an Automated Action.

**Note:** Tasks that have an 'Automated Action' attribute with a value of "Yes", will start to reflect the new value of "Automated Action" in the renamed 'Source' field.

Hover Box name: Automated Action Details

Hover Box attributes: These attributes will continue to display as they currently display in the CalSAWS System:

1. Name
2. Status
3. Action Type
4. Run Date
5. Scenario
6. Source

Automated Action Details	
Name:	IEVS Report: New PVS Match
Status:	Active
Action Type:	Create Task
Run Date:	Daily(Monday-Friday)
Scenario:	A new IEVS PVS match report has been assigned to a case, based on county configuration. Review the IEVS report.
Source:	Batch

**Figure 2.1.3-1 – Automated Action Details Hover Box**

b. MEDS Alert

- i. The Source will reflect "MEDS Alert" when the Task was created as a result of processing a MEDS Alert.
- ii. The mouse hover over will display the following details:

Hover Box name: MEDS Alert Details

Hover Box attributes (as available in the MEDS Alert Admin Detail page):

1. ID
2. Description
3. Type

MEDS Alert Details	
ID:	9003
Description:	DEATH REPORTED TO MEDS-MEDS/CDB ELIGIBILITY TERMINATED
Type:	URGENT

**Figure 2.1.3-2 – MEDS Alert Details Hover Box**

c. Document Routing Rule

- i. The Source will reflect "Document Routing Rule" when the Task was created as a result of processing a Document Routing Rule.
- ii. The mouse hover over will display the following details:

Hover Box name: Document Routing Rule Details

Hover Box attributes (as available in the Document Routing Rule Detail page):

1. Name

2. Assignment Type

Document Routing Rule Details	
Name:	MC RE Packet
Assignment Type:	Program Based Rule(s)

Document Routing Rule Details	
Name:	MC RE Packet
Assignment Type:	Specific Bank

**Figure 2.1.3-3 – Document Routing Rule Details Hover Box**

d. Manual

- i. The Source will reflect “Manual” when the Task was created manually.
- ii. The mouse hover over will display the following details:  
Hover Box name: Manual Details  
Hover Box attributes
  1. Worker ID
  2. Worker Name

Manual Details	
Worker ID:	00123456789
Worker Name:	John Doe

**Figure 2.1.3-4 – Manual Details Hover Box**

e. Task Upload

- i. The Source will reflect “Task Upload” when the Task was created as a result of processing a Task Upload file.
- ii. The mouse hover over will display the following details:  
Hover Box name: Task Upload Details  
Hover Box attributes (as available in the Task Upload Detail page):
  1. Type
  2. Name
  3. File Name

Task Upload Details	
Type:	Standard
Name:	New Tasks
File Name:	Standard.xlsx

**Figure 2.1.3-5 – Task Upload Details Hover Box**

f. Resulting Task



- i. The Source will reflect "Resulting Task" when the Task was created from a resulting Task configuration of a Task Type and/or Task Sub-Type.
- ii. The mouse hover over will display the following details:  
 Hover Box name: Resulting Task Details  
 Hover Box attributes (as available in the Task Type Detail page):
  1. Originating Task Type
  2. Originating Task Sub-Type – This attribute will only display if the Task originated from a Resulting Task configuration in the Task Sub-Type

Resulting Task Details	
Originating Task Type:	Intake

**Figure 2.1.3-6.1 – Resulting Task Details Hover Box – Resulting Task Type Originating from Task Type**

Resulting Task Details	
Originating Task Type:	Intake
Originating Task Sub-Type:	Intake Sub-Type

**Figure 2.1.3-6.2 – Resulting Task Details Hover Box – Resulting Task Type Originating from Task Sub-Type**

- g. Self Service Portal - The Source will reflect "Self Service Portal" when the Task was created by BenefitsCal.
  - h. External Trigger - The Source will reflect "External Trigger" when the Task was created external to CalSAWS.
  - i. Supervisor Authorization - The Source will reflect "Supervisor Authorization" when the Task was created as a result of Supervisor authorization.
  - j. Other – The Source will display as "Other" if a Task is generated that does not meet any of the above Sources.  
**Note:** "Other" is not expected to display as the previous sources cover all source scenarios.
3. Update all existing Tasks to also display the new 'Source' column and hover boxes.

#### 2.1.4 Page Location

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

#### 2.1.5 Security Updates

N/A

### 2.1.6 Page Mapping

---

Update Page Mapping to rename 'Automated Action' attribute to 'Source'.

### 2.1.7 Accessibility

---

None.

### 2.1.8 Page Usage/Data Volume Impacts

---

N/A

## 2.2 Automated Regression Test

### 2.2.1 Overview

---

Update existing automated regression test scripts that (1) verify task creation by one of the following methods, and (2) view the Task Detail page for the created task; to verify the Source value: Manual creation, BenefitsCal API, Tasks API.

For each of these methods for which there is no applicable existing script: Create a new automated regression test script to verify the Source value of a task created by this method.

### 2.2.2 Description of Change

---

1. Update existing regression scripts that manually create tasks through the Task Detail page and subsequently navigate to the Task Detail page to verify the new Source value.
2. Update existing regression scripts that create tasks through the BenefitsCal API to verify the new Source value on the Task Detail page.
3. Update existing regression scripts that create tasks through the Tasks API and subsequently navigate to the Task Detail page to verify the new Source value.
4. If no regression script currently exists for #1, #2, or #3: Create a new regression script to create a new task via the listed method and verify the Source value on the Task Detail page.

### 3 SUPPORTING DOCUMENTS

N/A

## 4 REQUIREMENTS

### 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.19.1.4	The LRS shall generate alerts, reminders, and controls that may not directly affect eligibility.	1. Update the Task Pop-Up: Task Detail page to include the details of the source which created a Task.

## 5 OUTREACH

N/A

## 6 APPENDIX

N/A

# Design

## **CA-276724**

ACL 18-43 - Add variable population for M40-107D

## DOCUMENT APPROVAL HISTORY

Prepared By

Aishwarya Shankar

Reviewed By

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
04/11/2025	1.0	Initial	Aishwarya Shankar



# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>2</b>
2.1	Add variable population logic to the M40-107D form .....	2
2.1.1	Overview .....	2
2.1.2	Form Verbiage.....	2
2.1.3	Form Variable Population.....	2
2.1.4	Form Generation Conditions.....	4

# CA-276724 – ACL 18-43 - Add variable population for M40-107D

## 1 OVERVIEW

This SCR adds variable population logic for the M40-107D form.

### 1.1 Current Design

The M40-107D form currently does not have variable population logic.

### 1.2 Requests

Add variable population logic for the M40-107D form.

### 1.3 Overview of Recommendations

1. Add variable population logic for the M40-107D form.

### 1.4 Assumptions

1. The M40-107D can be generated only via the Template Repository.
2. There are no changes to any existing functionality unless specified in this design document.

## 2 RECOMMENDATIONS

### 2.1 Add variable population logic to the M40-107D form

#### 2.1.1 Overview

This recommendation is to add variable population logic to the M40-107D form.

**State Form:** M40-107D (04/21)

**Current Program:** CalWORKs (CW)

**Current Attached Forms:** NA Back 9, NA 270

**Current Forms Category:** Forms

**Current Template Repository Visibility:** All Counties

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

**Current Print Options:** All

**Current Posted to SSP:** Yes

**Electronic Signatures:**

**Electronic Signature (IVR/Text):** No

**Check to Sign:** No

#### 2.1.2 Form Verbiage

There are no updates to the form verbiage for the M40-107D form.

#### 2.1.3 Form Variable Population

This effort will add the following variable population logic to the M40-107D form. Please see the following table:

Variable Name	Population	Formatting	Editable* / Field Type	Template Repository	Populates with Form Generation
Date	Populate the current date	Arial Font Size 10	Yes / Text Field	Yes	NA
County	Populate the county name	Arial Font Size 10	Yes / Text Field	Yes	NA
Months	Populates with the number of months of CalWORKs cash aid that has been used towards the federal TANF time limit. <b>Technical Note:</b> Populate value from	Arial Font Size 10	Yes / Text Field	Yes	NA

<p>FROM?</p> <p>Note: This variable on the form XDP is noted as FROM1, FROM2, etc...</p> <p>The number following "FROM" is denoted as a question mark in this entry</p>	<p>Populate the start date(s) of the time periods when the person received TANF funded aid in California.</p> <p><b>Technical Note:</b> Populate value from TIME_LIMIT_CASH_AID.EFF_D ATE</p>	<p>Arial Font Size 10</p>	<p>Yes / Text Field</p>	<p>Yes</p>	<p>NA</p>
<p>TO?</p> <p>Note: This variable on the form XDP is noted as TO1, TO2, etc...</p> <p>The number following "TO" is denoted as a question mark in this entry</p>	<p>Populate the end date(s) of the time periods when the person received TANF funded aid in California.</p> <p><b>Technical Note:</b> Populate value from TIME_LIMIT_CASH_AID.EFF_D ATE</p>	<p>Arial Font Size 10</p>	<p>Yes / Text Field</p>	<p>Yes</p>	<p>NA</p>
<p>MONTHS?</p> <p>Note: This variable on the form XDP is noted as MONTHS1, MONTHS2, etc...</p> <p>The number following "MONTHS" is denoted as a question mark in this entry</p>	<p>Populate the subtotal for each time period when the person received TANF funded aid in California</p> <p><b>Technical Note:</b> Use the time periods (date ranges) when the person received TANF funded aid in California to calculate the number of months per time period.</p>				
<p>FromExmtDate?</p> <p>Note: This variable on the form XDP is noted as FromExmtDate1, FromExmtDate2, etc...</p> <p>The number following "FromExmtDate" is denoted as a question mark in this entry</p>	<p>Populate the start date(s) of the time periods that did not count toward the participant's TANF 60-month time limit</p> <p><b>Technical Note:</b> Populate value from TIME_LIMIT_CASH_AID.EFF_D ATE</p>	<p>Arial Font Size 10</p>	<p>Yes / Text Field</p>	<p>Yes</p>	<p>NA</p>
<p>ToExmtDate?</p> <p>Note: This variable on the form XDP is noted as ToExmtDate1, ToExmtDate2, etc...</p> <p>The number following "ToExmtDate" is denoted as a</p>	<p>Populate the end date(s) of the time periods that did not count toward the participant's TANF 60-month time limit</p> <p><b>Technical Note:</b> Populate value from</p>	<p>Arial Font Size 10</p>	<p>Yes / Text Field</p>	<p>Yes</p>	<p>NA</p>

question mark in this entry	TIME_LIMIT_CASH_AID.EFF_DATE				
NumExmtMonths? Note: This variable on the form XDP is noted as NumExmtMonths1, NumExmtMonths2, etc... The number following "NumExmtMonths" is denoted as a question mark in this entry This is denoted as a question mark in this table	Populate the number month(s) that did not count toward the participant's TANF 60-month time limit  <b>Technical Note:</b> Use the FromExmtDate and ToExmtDate ranges to calculate the number of exempt months	Arial Font Size 10	Yes / Text Field	Yes	NA
Reason? Note: This variable on the form XDP is noted as Reason1, Reason2, etc... The number following "Reason" is denoted as a question mark in this entry This is denoted as a question mark in this table	Populate the reason that that the populated months did not count towards the participant's TANF 60-month time limit.  <b>Technical Note:</b> Populate value from time_limit_except.except_reason_code	Arial Font Size 10	Yes / Text Field	Yes	NA

\*TECHNICAL NOTE: As this SCR is currently targeted for an RWR release with minor version 24.08.xx, the data in SCATL will be used to populate the M40-107D form. Refer to the following tables:

TIME\_TRACK\_PERS

TIME\_LIMIT\_CASH\_AID

TIME\_LIMIT\_PGM\_PARTICPTN

TIME\_LIMIT\_EXCEPT

#### 2.1.4 Form Generation Conditions

There are no updates to the form generation conditions of the M40-107D form.

# Design

## **CA-279940**

Retire the Super Trigger MV refresh and sweep jobs that are no longer needed

## DOCUMENT APPROVAL HISTORY

Prepared By

Jessica Lopez

Reviewed By

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

5/19/2025

1.0

Initial Draft

Jessica Lopez

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	2
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>2</b>
2.1	[Page Name] – No Impact .....	3
2.2	[Eligibility Rules Updates] – No Impact .....	3
2.3	Batch - Retire Sweep Jobs .....	3
2.4	[eHIT] – No Impact .....	5
2.5	[Form/NOA Name] – No Impact .....	5
2.6	[Report Name] – No Impact .....	6
2.7	[Data Warehouse Name] – No Impact .....	6
2.8	[Data Change] – No Impact .....	6
2.9	[Automated Regression Test] – No Impact .....	6
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>7</b>
<b>4</b>	<b>OUTREACH .....</b>	<b>7</b>
4.1	Lists .....	7
<b>5</b>	<b>APPENDIX.....</b>	<b>7</b>



# CA-279940 – Retire the Super Trigger MV refresh and sweep jobs that are no longer needed

## 1 OVERVIEW

This SCR will retire Super Trigger jobs that are no longer used.

### 1.1 Current Design

Batch and Interface jobs rely on the "Super Trigger" process for Change Data Capture (CDC) to store copies of specific data collection tables into materialized views (Materialized View Refresh) for later comparison against the live transactional tables. Differences are detected via the Super Trigger Sweep jobs and are staged for processing by the Super Trigger Thread Jobs to ultimately be saved into the Super Trigger tables that are consumed by various downstream processes. However, several of these materialized views are no longer referenced in downstream processes and can be removed to improve batch SLA and save DB resources.

### 1.2 Requests

There are various materialized views that are being refreshed and processed by Super Trigger sweep jobs that are no longer referenced by downstream process that consume DB resources. Request to identify and retire Super Trigger Materialized Views, refresh and sweep jobs that are no longer used which would help batch SLAs tremendously and reduce consumption of DB resources.

### 1.3 Overview of Recommendations

Drop the Materialized Views (\_MV and 1\_MV) of these Super Trigger tables that are no longer used:

1. ABAWD\_EXEMPT
2. ABAWD\_STAT
3. CUST\_ACTIV\_ATTEND
4. EXPN\_AMT\_DETL
5. EXPN\_SELF\_DEDUCT
6. LCL\_MIN\_WAGE
7. MED\_COND
8. OTHER\_PGM\_ASSIST
9. PERS\_RELSHP
10. PREG
11. SCHL\_ATTEND

Decommission the materialized view refresh and sweep jobs associated with the above tables.

## **1.4 Assumptions**

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

## **2 RECOMMENDATIONS**

Decommission the materialized view refresh and sweep jobs associated with the Super Trigger tables that are no longer used.

## 2.1 [Page Name] – No Impact

## 2.2 [Eligibility Rules Updates] – No Impact

## 2.3 Batch - Retire Sweep Jobs

### 2.3.1 Overview

The Super Trigger process stores copies of specific data collection tables into materialized views used for various downstream processes. However, several of the materialized views are no longer used in said downstream processes. To improve batch SLA and reduce consumption of DB resources, the unused materialized views will be removed from the Super Trigger tables.

### 2.3.2 Description of Change

1. Create a Batch Schedule Change Request (BSCR) to turn off batch jobs and drop the Materialized Views (\_MV and 1\_MV) of these Super Trigger tables that are no longer used:

- a. ABAWD\_EXEMPT

<b>1_MV Refresh</b>	PB19S519
<b>_MV Refresh</b>	PB19S520
<b>Super trigger Sweep</b>	PB00S706

- b. ABAWD\_STAT

<b>1_MV Refresh</b>	PB19S256
<b>_MV Refresh</b>	PB19S356
<b>Super trigger Sweep</b>	PB00S256

- c. CUST\_ACTIV\_ATTEND

<b>1_MV Refresh</b>	PB00S489
<b>_MV Refresh</b>	PB00S490
<b>Super trigger Sweep</b>	PB00S488

- d. EXPN\_AMT\_DETL

<b>1_MV Refresh</b>	PB00S495
---------------------	----------

<b>_MV Refresh</b>	PB00S496
<b>Super trigger Sweep</b>	PB00S494

e. EXPN\_SELF\_DEDUCT

<b>1_MV Refresh</b>	PB00S492
<b>_MV Refresh</b>	PB00S493
<b>Super trigger Sweep</b>	PB00S491

f. LCL\_MIN\_WAGE

<b>1_MV Refresh</b>	PB19S523
<b>_MV Refresh</b>	PB19S524
<b>Super trigger Sweep</b>	PB00S708

g. MED\_COND

<b>1_MV Refresh</b>	PB19S255
<b>_MV Refresh</b>	PB19S355
<b>Super trigger Sweep</b>	PB00S255

h. OTHER\_PGM\_ASSIST

<b>1_MV Refresh</b>	PB19S295
<b>_MV Refresh</b>	PB19S395
<b>Super trigger Sweep</b>	PB00S295

i. PERS\_RELSPH

<b>1_MV Refresh</b>	PB19S257
<b>_MV Refresh</b>	PB19S357
<b>Super trigger Sweep</b>	PB00S257

j. PREG

<b>1_MV Refresh</b>	PB19S410
<b>_MV Refresh</b>	PB19S411

<b>Super trigger Sweep</b>	PB00S314
----------------------------	----------

k. SCHL\_ATTEND

<b>1_MV Refresh</b>	PB19S258
<b>_MV Refresh</b>	PB19S358
<b>Super trigger Sweep</b>	PB00S258

### 2.3.3 Execution Frequency

Daily.

### 2.3.4 Key Scheduling Dependencies

Not applicable.

### 2.3.5 Counties Impacted

All counties.

### 2.3.6 Category

Core

### 2.3.7 Data Volume/Performance

N/A.

### 2.3.8 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...)

## 2.4 [eHIT] – No Impact

## 2.5 [Form/NOA Name] – No Impact

**2.6 [Report Name] – No Impact**

**2.7 [Data Warehouse Name] – No Impact**

**2.8 [Data Change] – No Impact**

**2.9 [Automated Regression Test] – No Impact**

### 3 SUPPORTING DOCUMENTS

N/A.

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT

### 4 OUTREACH

N/A.

#### 4.1 Lists

N/A.

### 5 APPENDIX

N/A.

# Design

## **CA-281041**

Time on Aid (TOA) NOAs to be generated for Household member in the home.



CalSAWS	DOCUMENT APPROVAL HISTORY		
	Prepared By	Steven Contreras	
	Reviewed By		
DATE	VERSION	REVISION DESCRIPTION	AUTHOR
12/23/24	1.0	Initial Revision	Steven Contreras
05/05/25	2.0	Updates to the generation Conditions	Steven Contreras
05/20/25	3.0	Update to 1.3 Overview of recommendations, ART update.	Steven Contreras
06/12/25	4.0	Spelling error corrected	Steven Contreras

# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>1</b>
2.1	[Page Name] No Update Required .....	<b>Error! Bookmark not defined.</b>
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	[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 .....	4
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>4</b>
<b>4</b>	<b>OUTREACH .....</b>	<b>4</b>
4.1	Lists .....	<b>Error! Bookmark not defined.</b>
<b>5</b>	<b>APPENDIX .....</b>	<b>4</b>

# CA-281041 – TOA NOAs to be generated for HH members in the home.

## 1 OVERVIEW

This effort will update the Time on Aid (TOA) NOAs to only be generated for program persons that are in household status and approved for the program.

### 1.1 Current Design

Currently TOA NOA's are sent to all program persons regardless of their status in or out of household or denied or approved for the program.

### 1.2 Requests

Update triggers to only generate TOA NOA's in household approved program persons.

### 1.3 Overview of Recommendations

1. Update the M40-107A NOA CalWORKs No Change generation conditions to only generate TOA NOA's in HH approved program persons.
2. Update the M40-107B NOA CalWORKs No Change Time on Aid at Application/Redetermination generation conditions to only generate TOA NOA's in HH approved program persons.

### 1.4 Assumptions

1. There will be no updates to NOA verbiage.
2. There will be no updates to variable population.

## 2 RECOMMENDATIONS

### 2.1 Update CalWORKs No Change – 60 Month NOA

#### 2.1.1 Overview

This recommendation will update the existing trigger to only trigger for in household approved program persons

**Reason Fragment Name and ID:**

CW\_AP\_IN\_TL\_60\_REDETERM\_EXEMPTS\_AND\_CS\_A422 (9588)

**State Form/NOA:** M40- 107A

**Current NOA Template:** CW\_TL\_60\_NOA\_Template  
**Current Program(s):** CalWORKs  
**Current Action Type:** Informational/no change  
**Current Fragment Level:** Person  
**Currently Repeatable:** Yes, per person.  
**Includes NA Back 9:** Yes  
**Current Forms/NOAs Generated with this NOA:** NA  
**Existing Languages:** Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, Vietnamese, Hindi, Japanese, Mien, Punjabi, Thai, Ukrainian.

### 2.1.2 NOA from verbiage

---

There is no verbiage change.

### 2.1.3 Form/NOA Variable Population

---

There are no changes to the variable population.

### 2.1.4 Form/NOA Generation Conditions

---

Update this existing M40-107A NOA reason to generate for each program persons on CalWORKs program only when the program person is '**In the Home**' and is an '**Active Member**' in the most recent run EDBC. No other changes will be made to existing generation conditions.

## 2.2 Update CalWORKs No Change - Application/Redetermination NOA

### 2.2.1 Overview

---

This recommendation will update the existing trigger to only trigger for in household approved program persons

**Reason Fragment Name and ID:**

CW\_IN\_TL\_60\_REDETERM\_EXEMPTS\_AND\_CS\_A416 (9582)

**State Form/NOA:** M40- 107B

**Current NOA Template:** CW\_TL\_60\_NOA\_Template

**Current Program(s):** CalWORKs

**Current Action Type:** Informational/no change

**Current Fragment Level:** Person

**Currently Repeatable:** Yes, per person.

**Includes NA Back 9:** Yes

**Current Forms/NOAs Generated with this NOA:** NA

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

### 2.2.2 Form/NOA Verbiage

---

There are no changes to the verbiage.

### 2.2.3 Form/NOA Variable Population

---

There are no changes to the variable population.

### 2.2.4 Form/NOA Generation Conditions

---

Update this existing M40-107B NOA reason to generate for each program persons on CalWORKs program only when the program person is '**In the Home**' and is an '**Active Member**' in the most recent run EDBC. No other changes will be made to existing generation conditions.

## 2.3 [Eligibility Rules Updates] -No Update Required

## 2.4 [Batch Name] -No Update Required

## 2.5 [Interface Name] -No Update Required

## 2.6 [eHIT] -No Update Required

## 2.7 [Form/NOA Name]

See recommendations

## 2.8 [Report Name] -No Update Required

## 2.9 [Data Warehouse Name] -No Update Required

## 2.10 [Data Change] -No Update Required

## 2.11 [Automated Regression Test] No Testing Required

### 3 SUPPORTING DOCUMENTS

NUMBER	FUNCTIONAL AREA	DESCRIPTION	ATTACHMENT

### 4 OUTREACH

N/A

### 5 APPENDIX

N/A

# Design

## **CA-288696**

Capture External Agency Information on Non-County Staff Detail

## DOCUMENT APPROVAL HISTORY

Prepared By

Erika Kusnadi-Cerezo

Reviewed By

Naga Chinduluru, Michael Wu, Chitra Barsagade, Sunitha Sampathkumar, Denise Barajas

DATE

VERSION

REVISION DESCRIPTION

AUTHOR

04/15/2025

1.0

Initial

Kusnadi.E



# Table of Contents

<b>1</b>	<b>OVERVIEW .....</b>	<b>1</b>
1.1	Current Design .....	1
1.2	Requests .....	1
1.3	Overview of Recommendations .....	1
1.4	Assumptions.....	1
<b>2</b>	<b>RECOMMENDATIONS .....</b>	<b>2</b>
2.1	Non-County Staff Search .....	2
2.2	Non-County Staff Detail .....	3
2.3	[Eligibility Rules Updates] – No Impact .....	7
2.4	[Batch Name] – No Impact .....	7
2.5	[Interface Name] – No Impact .....	7
2.6	[eHIT] – No Impact .....	8
2.7	[Form/NOA Name] – No Impact .....	8
2.8	[Report Name] – No Impact .....	8
2.9	[Data Warehouse Name] – No Impact .....	8
2.10	[Data Change] – No Impact .....	8
2.11	Automated Regression Test .....	8
<b>3</b>	<b>SUPPORTING DOCUMENTS .....</b>	<b>8</b>
<b>4</b>	<b>OUTREACH .....</b>	<b>8</b>
4.1	Lists .....	8
<b>5</b>	<b>APPENDIX.....</b>	<b>9</b>

# CA-288696 – Capture External Agency Information on Non-County Staff Detail

## 1 OVERVIEW

### 1.1 Current Design

Currently in CalSAWS, there is no ability to identify Non-County Staff that belong to an external agency.

### 1.2 Requests

Update CalSAWS with the ability to identify Non-County Staff who belong to an external agency.

### 1.3 Overview of Recommendations

1. Update the Non-County Staff Search page to allow users to search for non-county staff who have been identified as external agencies.
2. Update the Non-County Staff Detail page with new fields that users can use to identify non-county staff who belong to an external agency.

### 1.4 Assumptions

1. All existing functionalities will remain unchanged unless called out as part of this SCR.
2. Counties will need to update the Non-County Staff Detail record manually to identify non-county staff who are part of an external agency.
3. CA-283188 adds the ability to add external agencies by county into CalSAWS and associate them to staff/non-county staff.
4. When a user is viewing a Non-County Staff record through the Staff Detail page, the External Agency check box field and the External Agency Name field will display the same information found on the Non-County Staff record.

## 2 RECOMMENDATIONS

### 2.1 Non-County Staff Search

#### 2.1.1 Overview

The Non-County Staff Search page allows users to search for a non-county staff worker profile. This SCR will add a new 'External Agency' field that can be used to search for non-county staff who have the External Agency field checked on the Non-County Staff Detail page.

#### 2.1.2 Non-County Staff Search Mockup

**Non-County Staff Search**

Search

Staff Name:

Classification:

Status:

Begin Date:

End Date:

☐ External Agency

Results per Page:  Search

**Figure 2.1.1 – Non-County Staff Search**

#### 2.1.3 Description of Changes

1. Add a new field on the Non-County Staff Search page.
  - a. The field will be titled 'External Agency' and will have a check box.
    - i. The field will not be checked off by default.
2. Update the Search logic to return non-county staff that have the 'External Agency' field checked off on the Non-County Staff Detail page (this is a new field being added as part of this SCR) on the Search Result Summary when the 'External Agency' field is checked off on the Refine Your Search section on the Non-County Staff Search page.
  - a. When the 'External Agency' field is not checked off, return all non-county staff who meets all the other search criteria on the Search Result Summary Section.

#### Example:

Non-County Staff Record exist for Mickey Mouse, Minnie Mouse, Donald ,and Daisy. Mickey and Minnie have the External Agency checked off (field on the Non-County Staff Detail page) while Donald and Daisy do not.

On the Non-County Staff Search page, the user checks off the External Agency field, only Mickey and Minnie will be returned on the Search Result Summary.

On the Non-County Staff Search page, the user leaves the External Agency field unchecked, Mickey, Minnie, Donald, and Daisy will be returned on the Search Result Summary.

#### 2.1.4 Page Location

---

- **Global: Admin Tools**
- **Local: Admin**
- **Task: Non-County Staff**

#### 2.1.5 Security Updates

---

N/A

#### 2.1.6 Page Mapping

---

Update page mapping with the new field being added to the page.

#### 2.1.7 Accessibility

---

Accessibility was access for the Non-County Staff Search page, and found no updates are needed.

#### 2.1.8 Page Usage/Data Volume Impacts

---

N/A

## 2.2 Non-County Staff Detail

### 2.2.1 Overview

---

The Non-County Staff Detail page allows users to view or modify non-county staff profiles. This SCR will add new fields to the Non-County Staff Detail page to allow users to indicate if the non-county staff belongs to an external agency.

### 2.2.2 Non-County Staff Detail Mockup

---

### Non-County Staff Detail

\*- Indicates required fields

SaveCancel

General Staff Information

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Classification Title: \*

- Select -

Staff ID:

☐ External Agency

E-mail Address: \*

Comments:

Security Profile

User Name:

Login Status:

Password:

County Access

Status	Begin Date	End Date	Updated By
No Data Found			

SaveCancel

Figure 2.2.1.a – Non-County Staff Detail page (Create Mode – External Agency unchecked)

### Non-County Staff Detail

\*- Indicates required fields

SaveCancel

General Staff Information

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Classification Title: \*

- Select -

Staff ID:

☒ External Agency

E-mail Address: \*

Comments:

Security Profile

User Name:

Login Status:

Password:

County Access

Status	Begin Date	End Date	Updated By
No Data Found			

SaveCancel

Figure 2.2.1.b – Non-County Staff Detail page (Create Mode – External Agency checked)

### Non-County Staff Detail

\*- Indicates required fields

Save Cancel

#### General Staff Information

<b>First Name: *</b>	<b>Middle Name:</b>	<b>Last Name: *</b>	<b>Suffix:</b>
<input type="text" value="Jane"/>	<input type="text"/>	<input type="text" value="Doe"/>	<input type="text" value=""/>

**Classification Title: \*** Project Staff

**Staff ID:** 1234567

☐ External Agency

**E-mail Address: \***

**Comments:**

#### Security Profile

**User Name:** DoeJ **Login Status:** Active

Remove

Save Cancel

Figure 2.2.2.a – Non-County Staff Detail page (Edit Mode – External Agency unchecked)

### Non-County Staff Detail

\*- Indicates required fields

Save Cancel

#### General Staff Information

<b>First Name: *</b>	<b>Middle Name:</b>	<b>Last Name: *</b>	<b>Suffix:</b>
<input type="text" value="Jane"/>	<input type="text"/>	<input type="text" value="Doe"/>	<input type="text" value=""/>

**Classification Title: \*** Project Staff

**Staff ID:** 1234567

☒ External Agency

**E-mail Address: \***

**External Agency Name: \***

**Comments:**

#### Security Profile

**User Name:** DoeJ **Login Status:** Active

Remove

Save Cancel

Figure 2.2.2.b – Non-County Staff Detail page (Edit Mode – External Agency checked)

Non-County Staff Detail

\*- Indicates required fields

Security AssignmentEditClose

General Staff Information

First Name: \*Jane

Middle Name:

Last Name: \*Doe

Suffix:

Classification Title: \*Project Staff

Staff ID: 1234567

External Agency

E-mail Address: \*johndoe@testcalsaws.org

Comments:

Security Profile

User Name: DoeJ

Login Status: Active

Security AssignmentEditClose

Figure 2.2.3.a – Non-County Staff Detail page (View Mode – External Agency unchecked)

Non-County Staff Detail

\*- Indicates required fields

Security AssignmentEditClose

General Staff Information

First Name: \*Jane

Middle Name:

Last Name: \*Doe

Suffix:

Classification Title: \*Project Staff

Staff ID: 1234567

✓ External Agency

E-mail Address: \*johndoe@testcalsaws.org

Comments:

External Agency Name: \*Disney Land

Security Profile

User Name: DoeJ

Login Status: Active

Security AssignmentEditClose

Figure 2.2.3.b – Non-County Staff Detail page (View Mode – External Agency checked)

## 2.2.3 Description of Changes

1. Add two new fields on the Non-County Staff Detail page.
  - a. Title the 1<sup>st</sup> field 'External Agency' and is a check box.
    - i. This will be an editable field and will not be checked off by default.
      1. Existing/historical records will not have the 'External Agency' field checked off.

- b. Title the 2<sup>nd</sup> field 'External Agency Name:' and will have a text box.
  - i. This field will only display when the 'External Agency' field is checked off.
    1. This field will be required and editable.
    2. There will be a maximum of 30-character limit.
      - a. Once the maximum amount of character is reached, users are not able to enter more characters.
      - b. Only alpha and numerical values are allowed.
    3. Information inputted on the 'External Agency Name' field will not be saved, or it will be removed when the 'External Agency' field is not checked off upon saving.

**Note:** Both the 'External Agency' and the 'External Agency Name' field will function the same way as the 'External Agency' and the 'External Agency Name' field found on the Staff Detail page.

#### 2.2.4 Page Location

---

- **Global: Admin Tools**
- **Local: Admin**
- **Task: Non-County Staff**

#### 2.2.5 Security Updates

---

N/A

#### 2.2.6 Page Mapping

---

Update page mapping with the new fields being added to the page.

#### 2.2.7 Accessibility

---

Accessibility was access for the Non-County Staff Search page, and found no updates are needed.

#### 2.2.8 Page Usage/Data Volume Impacts

---

N/A

### 2.3 [Eligibility Rules Updates] – No Impact

### 2.4 [Batch Name] – No Impact

### 2.5 [Interface Name] – No Impact



## 2.6 [eHIT] – No Impact

## 2.7 [Form/NOA Name] – No Impact

## 2.8 [Report Name] – No Impact

## 2.9 [Data Warehouse Name] – No Impact

## 2.10 [Data Change] – No Impact

## 2.11 Automated Regression Test

### 2.11.1 Overview

---

Create new automated regression test scripts to verify that the Non-County Staff Detail page can be saved with External Agency selected and External Agency Name populated, and that the saved record can be retrieved via the Non-County Staff Search page.

### 2.11.2 Description of Change

---

1. Create a regression script to: (1) Navigate to the Non-County Staff Detail page in create mode, select the External Agency check box, enter a valid External Agency Name value, and save the page; (2) Search for the saved record via the Non-County Staff Search page and verify that the record displays in the search results.

## 3 SUPPORTING DOCUMENTS

N/A

## 4 OUTREACH

N/A

### 4.1 Lists

N/A

## 5 APPENDIX

N/A