CalSAWS

California Statewide Automated Welfare System

Design

CA-234705

Allow User to Add and Modify Household Change Apply Date

	DOCUMENT APPROVAL HISTORY		
CalSAWS	Prepared By	Giovanni Gonzalez Makenzie Johnson	
	Reviewed By	Sarah Rich	

Date	Version	Revision Description	Author

Table of Contents

CA-234705 – Allow User to Add and Modify Household Change Apply Date

1 OVERVIEW

Based on ACL 12-25 a new Change Reason type will be added to allow the worker to utilize the Begin Date of the record as the Apply Date for program eligibility determination.

1.1 Current Design

Many data collection pages throughout CalSAWS include the Change Reason panel. When in Create or Edit mode, the Change Reason panel displays the New Change Reason drop-list and New Reported Date fields.

CalSAWS EDBC uses Change Reason logic to determine the benefit month for which data will be applied. The logic determines the apply date based on the Change Reason type, Report Date, and the Begin Date/End Date on the data collection page. In most instances, the Change Reason type is informational and does not affect the apply date. The exception is "State Hearing Decision" Change reason type which will immediately apply the new data to the program, regardless of positive or negative EDBC results.

1.2 Requests

Create a new Change Reason type that will immediately apply the new data to EDBC regardless of positive or negative impact benefits.

1.3 Overview of Recommendations

1. Create a new Change Reason of Apply Begin Date that will appear on all data collection pages where Change Reason fields are available.
2. Update EDBC logic to treat data with the Apply Begin Date Change Reason type as a Mandated type, similarly, to State Hearing Decision.

1.4 Assumptions

1. The EDBC Change Reason logic being updated by this SCR does not have an implementation date. Once this SCR is implemented, the modified EDBC logic will apply to any data old or new with the Apply Begin Date change reason.
2. This change will impact all programs which utilize Change Reason EDBC logic.
3. There is no impact to when and where the New Change Reason drop-list is displayed in the system.

4. The new Change Reason will display on the Change Reason List and Change Reason Detail pages.

2 RECOMMENDATIONS

Create a new option for the Change Reason drop-down list and update EDBC to consider the new reason as a mandated Change Reason type.

2.1 Online - Customer Information Pages

2.1.1 Overview

Add a new change reason of "Apply Begin Date" to the New Change Reason drop-list.

2.1.2 Customer Information Pages Mockup

Household Status Detail
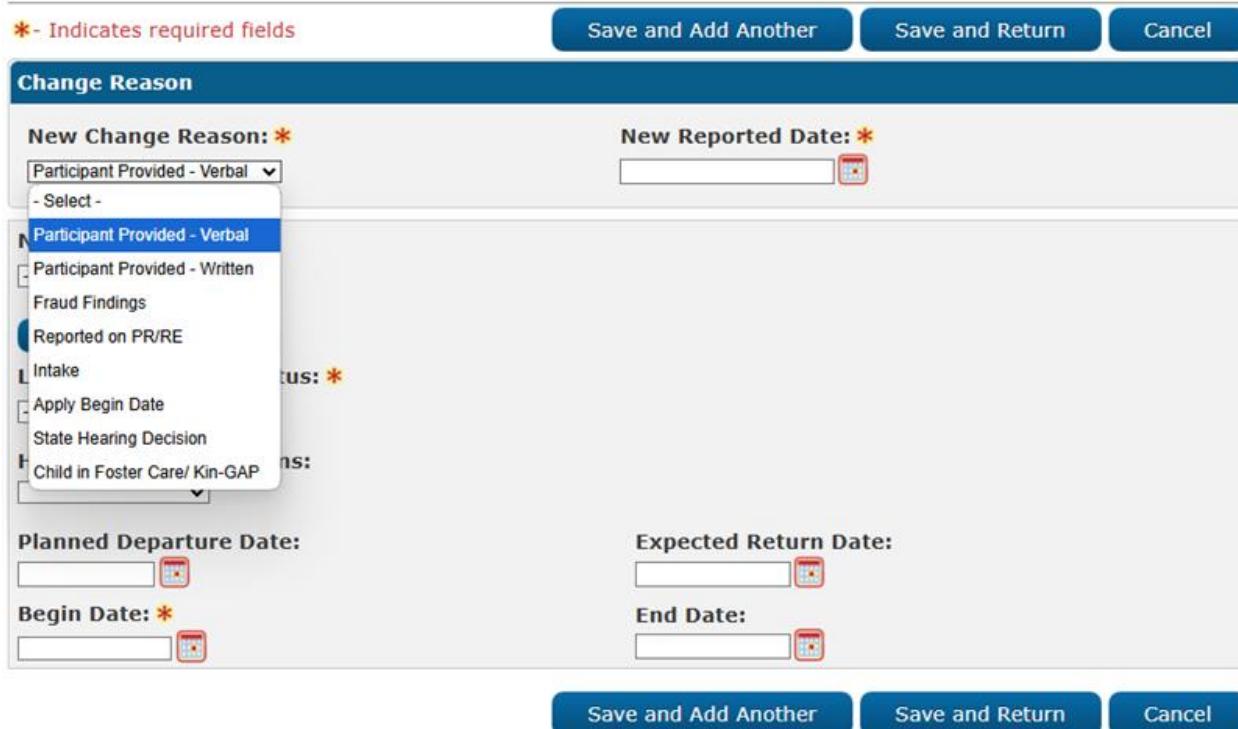
Figure 2.1.2-1 – New Value in the 'New Change Reason' Drop-Down

2.1.3 Description of Changes

1. Update the 'New Change Reason' drop-down field to include the value "Apply Begin Date".
   a. The new value will be below the "Intake" option and above the "State Hearing Decision" option.
   b. The pages that contain the 'New Change Reason' drop-list field are:
      i. Citizenship Status Detail
      ii. Employment Detail
      iii. Employment Status Detail
      iv. Expense Amount Detail

> v. Household Status Detail
> vi. Income Amount Detail
> vii. Living Arrangement Detail
> viii. Medical Condition Detail
> ix. Medicare Detail
> x. Missing Relationship List
> xi. Pregnancy Detail
> xii. Property History Detail
>> 1. Note: This page has four instances for the following property types: 'Liquid', 'Motor Vehicle', 'Personal', and 'Real'.
> xiii. Purchase and Prepare Detail
> xiv. Recurring Special Needs Detail
> xv. Relationship Detail
> xvi. Residency Detail
> xvii. School Attendance Status Detail
> xviii. Transferred Property / Income Detail
> xix. Unemployment Deprivation Detail

2. Apply a Code Table Change Request (CTCR) to create a new record in the Code Detail Table for the new value in the 'New Change Reason' field.

FIELD	VALUE
CATGRY_ID	10261
CODE_NUM_IDENTIF	[TBD]
SHORT_DECODE_NAME	Apply Begin Date
LONG_DECODE_NAME	Apply Begin Date
CODE_DESCR	The change will be applied to the processed benefit month. The Apply Begin Date requires that data be applied to EDBC as of the data collection record Begin Date.
ORDER_BY_NUM	0
BEG_DATE	01/01/1000
END_DATE	12/31/9999

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Citizenship, Employment, Expenses, Household Status, Income, Living Arrgmt, Medical Condition, Medicare, Pregnancy, Property, Purch. and Prep., Special Needs, Relationship, Residency, School Attend., Unempl. Depriv.

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Accessibility

N/A

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 EDBC Change Reason Updates

2.2.1 Overview

EDBC will consider the new Apply Begin Date type as a mandated type and utilize the Begin Date of the record as the apply date for EDBC.

2.2.2 Description of Changes

1. Apply a CTCR to create a new Code Table entry with the following:

FIELD	VALUE
CATGRY_ID	10550
CODE_NUM_IDENTIF	[TBD]
SHORT_DECODE_NAME	Apply Begin Date
LONG_DECODE_NAME	The change will be applied to the processed benefit month. The Apply Begin Date requires that data be applied to EDBC as of the data collection record Begin Date.
CODE_DESCR	[NULL]
ORDER_BY_NUM	0
BEG_DATE	01/01/1000
END_DATE	12/31/9999

Note: EDBC Change Reason Apply Date Reasons display in the system on the Change Reason Detail page and the Change Reason List – New Apply Dates page. Below are some mockups on how this will look on the following pages.

Change Reason Detail

* - Indicates required fields

[View History] [Close]

Type:
Income Amount Detail

Begin Date: **End Date:**
02/01/2025

Change Reason: *   **Report Date:** *
Apply Begin Date   02/01/2025

Program Evaluation

Case	Program	Status	Apply Date	Apply Reason
CH4P082	CalFresh	Applied	02/01/2025	Apply Begin Date
CH4P082	CalWORKs	Applied	02/01/2025	Apply Begin Date

[View History] [Close]

This Type 1 page took 1.56 seconds to load.

CalWORKs Change Reason List - New Apply Dates

[Close]

Search Results Summary						**Results 1 - 1 of 1**
Type	Change Reason	Report Date	Begin Date	End Date	Apply Date	Apply Reason
Income Amount Detail	Apply Begin Date	02/01/2025	02/01/2025		02/01/2025	Apply Begin Date

[Close]

This Type 1 page took 1.17 seconds to load.

2. Update EDBC logic to take in the new Change Reason type (Apply Begin Date) and consider it as a Mandated type. The data should be applied in any month in which it exists based on the Begin Date of the data.
   a. Update EDBC to set the Apply Date Reason to the Apply Begin Date value added in the previous section.

2.2.3 Example Scenarios

Example 1: For a CalWORKs/CalFresh combo case, add income for the current month (i.e. June 15th, 2025) for $1000 with a Category of Earnings, Type of Salary, Wages, and a Frequency of Monthly. Run EDBC for the current month (i.e. June 2025) and future month (July 2025). The income should have an apply date of June 15th, 2025, and it should be applied for both the June and July benefit months.

Example 2: For a CalWORKs/CalFresh combo case, add income for the current month (i.e. June 15th, 2025) for $1000 with a Category of Earnings, Type of Salary, Wages, and a Frequency of Monthly. Run EDBC for the future month (July 2025). The income should have an apply date of July 1st, 2025, and it should be applied for the July benefit month. Run EDBC for the June 2025 benefit month. The income should take effect, and the Apply Date of the Change Reason record should change and be June 15th, 2025.

2.2.4 Programs Impacted

CAPI, CalFresh, CalWORKs, Refugee Cash Assistance, General Assistance/General Relief, GA/GR Automated Solution

2.2.5 Performance Impacts

None anticipated.

2.3 [Batch Name] – No Impact

2.4 [Interface Name] – No Impact

2.5 [eHIT] - No Impact – No Impact

2.6 [Form/NOA Name] – No Impact

2.7 [Report Name] – No Impact

2.8 [Data Warehouse Name] – No Impact

2.9 [Data Change] – No Impact

2.10 [Automated Regression Test]

2.10.1 Overview

Update automation tests to validate the new "Apply Begin Date" change reason. This includes verifying its presence in dropdowns, and correcting EDBC logic. implementation (mandated change, begin date application), and accurate "Apply Date Reason" setting.

2.10.2 Description of Change

1. Update the automated regression test for the "Change Reason" drop down on respective data collection pages to include the "Apply Begin Date" change reason.

2. Update the automated regression test so that the EDBC logic implements and accurately uses the new "Apply Date Reason" change reason.

3   SUPPORTING DOCUMENTS

N/A

4   OUTREACH

N/A

5   APPENDIX

N/A