

CalSAWS

California Statewide Automated Welfare System



Design

CA-296576

CalFresh Processing HR1 Work Group - Automate
Expense Contributors

DOCUMENT APPROVAL HISTORY

Prepared By	Makenzie Johnson
Reviewed By	Norma Meza, Elsa Vaisau, Dymas Pena, Caroline Bui, Carlos Albances

DATE	VERSION	REVISION DESCRIPTION	AUTHOR
03/02/2026	1.0	Initial Draft	Makenzie Johnson

Table of Contents

- 1 OVERVIEW 1**
 - 1.1 Current Design 1
 - 1.2 Requests 1
 - 1.3 Overview of Recommendations 1
 - 1.4 Assumptions..... 1
- 2 RECOMMENDATIONS 1**
 - 2.1 Expense Detail..... 1
 - 2.2 Expense Contributors Detail..... 6
 - 2.3 Eligibility Rules Updates – No Impact..... 7
 - 2.4 Batch Name – No Impact 7
 - 2.5 Interface Name – No Impact 8
 - 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
- 3 SUPPORTING DOCUMENTS 9**
- 4 OUTREACH 9**
- 5 APPENDIX..... 9**

CA-296576 – CalFresh Processing HR1 Work Group - Automate Expense Contributors

1 OVERVIEW

1.1 Current Design

As part of the HR1 policy changes, the CalSAWS project established a CalFresh Processing Work Group to gather and prioritize CalSAWS system needs which can help improve CalFresh processing and reduce CalFresh Error Rates.

Currently, on the Expense Detail page users must manually enter all the contributors for that expense.

1.2 Requests

This SCR captures 1 of the 15 prioritized requirements from the CalFresh Processing HR1 workgroup, which was categorized under the functional grouping of "Technical Changes".

Update functionality to add a button that populates all the individuals in the home as contributors for certain expense categories.

1.3 Overview of Recommendations

1. Update the Expense Detail page to have the functionality to automatically create a Contributors record with individuals determined to most likely be contributors for that expense. Contributors will be determined by looking at the household status of individuals on the case.

1.4 Assumptions

1. Workers need to review the auto-populated contributors record to ensure accuracy.
2. Existing CalSAWS functionality remains unchanged unless specified in this design document.
3. This SCR will be assessed for training impact and corresponding SCRs will be created for Job Aids as needed.

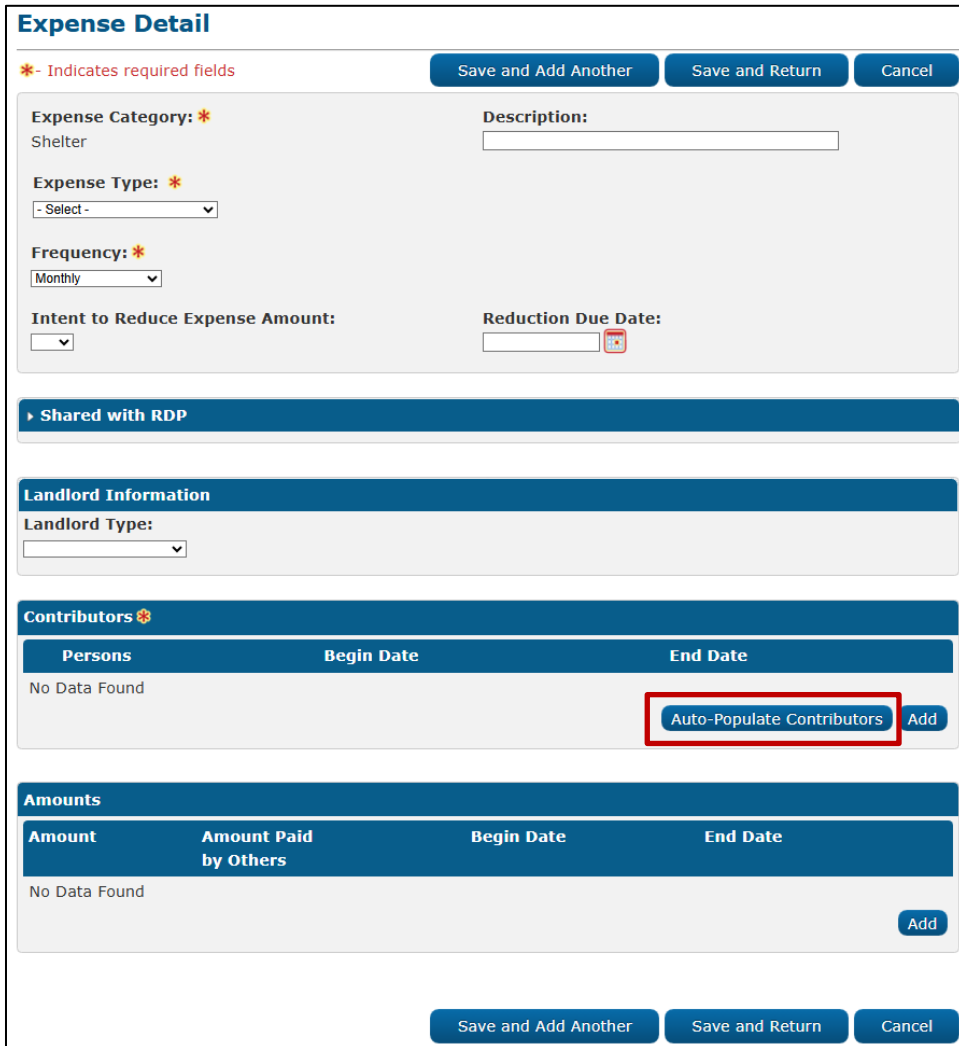
2 RECOMMENDATIONS

2.1 Expense Detail

2.1.1 Overview

Update the existing Expense Detail page so that when new Expense Detail records are created, there is an Expense Contributors Detail record automatically created for that Expense Detail record.

2.1.2 Expense Detail Mockup



The mockup shows a form titled "Expense Detail" with a header bar containing "Save and Add Another", "Save and Return", and "Cancel" buttons. A red asterisk icon indicates required fields. The form is divided into several sections:

- Expense Category:** A dropdown menu with "Shelter" selected.
- Description:** A text input field.
- Expense Type:** A dropdown menu with "- Select -" selected.
- Frequency:** A dropdown menu with "Monthly" selected.
- Intent to Reduce Expense Amount:** A dropdown menu.
- Reduction Due Date:** A date input field with a calendar icon.

Below these fields are three expandable sections:

- Shared with RDP:** A blue bar with a right-pointing arrow.
- Landlord Information:** A blue bar with a dropdown menu for "Landlord Type".
- Contributors:** A blue bar with a red asterisk icon. Below it is a table with columns "Persons", "Begin Date", and "End Date". The table contains "No Data Found". A red box highlights the "Auto-Populate Contributors" button, which is next to an "Add" button.

At the bottom of the form is another expandable section:

- Amounts:** A blue bar with columns "Amount", "Amount Paid by Others", "Begin Date", and "End Date". The table contains "No Data Found". An "Add" button is located at the bottom right of this section.

At the very bottom of the form are three buttons: "Save and Add Another", "Save and Return", and "Cancel".

Figure 2.1.1 – Expense Detail Mockup – without Contributors Added [Create Mode]

Expense Detail

* - Indicates required fields

Images Save and Add Another Save and Return Cancel

Expense Category: * Shelter **Description:**

Expense Type: *

Frequency: *

Intent to Reduce Expense Amount: **Reduction Due Date:**

Shared with RDP

Landlord Information

Landlord Type:

Contributors *

Persons	Begin Date	End Date
PENAZ, DIONNA 31F	02/01/2026	
Wolfenden, Elwin 30F		

Edit

Amounts

Amount	Amount Paid by Others	Begin Date	End Date
No Data Found			

Add

Images Save and Add Another Save and Return Cancel

Figure 2.1.2 – Expense Detail Mockup – with Contributors Added [Create Mode]

Expense Detail

*- Indicates required fields

Images Save and Add Another Save and Return Cancel

- Ensure that all contributing household members were correctly selected and then save again.

Expense Category: * Shelter **Description:**

Expense Type: * Rent

Frequency: * Monthly

Intent to Reduce Expense Amount: **Reduction Due Date:**

Shared with RDP

Landlord Information

Landlord Type:

Contributors *

Persons	Begin Date	End Date
PENAZ, DIONNA 31F	02/01/2026	
Wolfenden, Elwin 30F		

Remove Edit

Amounts

Amount	Amount Paid by Others	Begin Date	End Date
<input type="checkbox"/> 55.00	0.00	02/01/2026	

Remove Edit

Images Save and Add Another Save and Return Cancel

Figure 2.1.2 – Expense Detail Mockup – Validation Triggered [Create Mode]

Expense Detail

* - Indicates required fields

Images Save and Return Cancel

Expense Category: *
Shelter

Description:

Expense Type: *
Rent

Frequency: *
Monthly

Intent to Reduce Expense Amount:

Reduction Due Date:

Shared with RDP

Landlord Information

Landlord Type:

Display From: To: View

Contributors *

Persons	Begin Date	End Date	
Wolfenden, Elwin 30F			
PENNA, DINA 63F(EF)			
PENAZ, DIONNA 31F			
Mccorkell, Viviana 76M	02/06/2026		Edit
WOLFENDEN, ISIDRO 27F			
Wolfenden, Krishna 58M			
WOLFENDEN, MARINELA 54F			
WOLFENDEN, MARINELA 54F	03/14/2004	02/05/2026	Edit
			Add

Amounts

Amount	Amount Paid by Others	Begin Date	End Date	
<input type="checkbox"/> 1,000.00	0.00	05/30/2002		Edit
<input type="button" value="Remove"/>				Add

Images Save and Return Cancel

Figure 2.1.3 – Expense Detail Mockup [Edit Mode]

2.1.3 Description of Changes

1. Update the Expense Detail page to include a new 'Auto-Populate Contributors' button next to the 'Add' button in the Contributors section.
 - a. This button will only display in Create Mode for the Shelter, Utilities, and Utility Allowance Expense Categories.
 - b. When clicked, a Contributors record will be created.
 - i. The 'Persons' on the record will be all individuals in 'Pending' or 'Active' status on a program on the case and have a Household Status of 'In the Home'.
 - ii. The 'Begin Date' on the record will be determined as follows:

1. Take the most current Application Date of a CalFresh program in 'Pending' status on the case.
 2. If there is an ongoing CalFresh program, take the first of the future month.
 3. If there is no active or pending CalFresh program on the case, take the first of the current month.
2. Add a Soft Validation that is triggered when the 'Auto-Populate Contributors' has been used and then the 'Save and Return' or 'Save and Add Another' button is clicked. The validation will read, "Ensure that all contributing household members were correctly selected and then save again."
 3. Note: When in Create mode, once a Contributors record is created no additional record can be created. Therefore, neither the 'Auto-Populate Contributors' or 'Add' button will be displayed once a Contributors record is created in Create mode.
 4. Note: When this new 'Auto-Populate Contributors' button is clicked, an audit log record will be created.

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Expenses
 - Select an Expense Category
 - Click 'Add'

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping to reflect the page changes made.

2.1.7 Accessibility

This page should be assessed for accessibility requirements to meet Accessibility Standards.

2.1.8 Page Usage/Data Volume Impacts

N/A

2.2 Expense Contributors Detail

2.2.1 Overview

Update the existing Expense Contributors Detail page so that the Person(s) field is editable when the Expense Contributors Detail page is accessed from the Expense Detail page in Create mode.

2.2.2 Expense Contributors Detail Mockup

The mockup shows a form titled "Expense Contributors Detail". At the top right are "Save and Return" and "Cancel" buttons. Below the title is a red asterisk and the text "*- Indicates required fields". The main form area contains a "Person(s): *" dropdown menu, which is highlighted with a red box. The dropdown menu is open, showing options: "- Select -", "PENNA, DINA 63F(EF)", "PENAZ, DIONNA 31F", and "Wolfenden, Elwin 30F". Below the dropdown are "Begin Date: *" and "End Date:" fields, each with a calendar icon. At the bottom right are "Save and Return" and "Cancel" buttons.

Figure 2.1.1 – Expense Contributors Detail Mockup [Edit Mode]

2.2.3 Description of Changes

1. Update the Person(s) field to be editable in Edit mode only when accessing the page from the Expense Detail page in Create Mode.

2.2.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Expenses
 - Select an Expense Category
 - Click 'Add'
 - Click 'Edit' on the Contributors record

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Accessibility

This page should be assessed for accessibility requirements to meet Accessibility Standards.

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

Assess for creation of new regression test scripts and updates to existing regression test scripts based on the system test scenarios for the permanent functional changes outlined above.

2.11.2 Description of Change

1. Evaluate each system test scenario for the potential of automation. Known exclusionary criteria:
 - a. Temporary or one-time changes (ex., Data Change Requests, operational batch job execution)
 - b. Technical limitations (ex., visual comparison of a static document against a template)
 - c. Security restrictions (ex., access to an external service requiring Multi-Factor Authentication)
 - d. Required manual intervention (ex., physical printing, document scanning, forced service outage)
2. For each scenario determined to be an automation candidate, modify the system test scenario to be executable as part of the Regression Test Suite. This may include the following:
 - a. Repeatability: The script must be able to execute multiple times between data refreshes.

- b. Targetability: The script must fully and accurately verify the actual result against the expected result of the scenario

3 SUPPORTING DOCUMENTS

N/A

4 OUTREACH

N/A

5 APPENDIX

N/A