




Design Document

SCR CA 202544 – Update the DCFS Outstanding Overpayments Report to Include External Recovery Accounts

	DOCUMENT APPROVAL HISTORY	
	Prepared By	Uma Sarangmath
	Reviewed By	Justin Dobbs, Kapil Santosh, Himanshu Jain, Haikaz Tombakian

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/25/2019	1.0	Initial Draft	Uma Sarangmath

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1 OVERVIEW

The purpose of this SCR is to modify the DCFS Outstanding Overpayments Report to include external recovery account information.

1.1 Current Design

The DCFS Outstanding Overpayments Report currently displays a list of all the outstanding overpayments for active Foster Care, Adoption Assistance and Kin Gap programs but does not display external recovery accounts, which do not have any programs associated with them.

1.2 Requests

Modify the DCFS Outstanding Overpayments Report to include the external recovery account information.

1.3 Overview of Recommendations

Update the DCFS Outstanding Overpayments Report logic to display the External Recovery Accounts in the list of outstanding overpayments.

1.4 Assumptions

Data points on the report that are not available for external recovery accounts will display blank in the report details.

2 RECOMMENDATIONS

2.1 Overview

2.1.1 Update the DCFS Outstanding Overpayments Report to include the External Recovery Accounts in the list of outstanding overpayments.

Because a direct link does not exist between an external Recovery Account and a program, the report logic will attempt to determine the appropriate program for the external Recovery Account by matching on the Case ID and the Program Code of the Recovery Account. If the case associated to the external Recovery Account does not include a program that matches the program code of the external Recovery Account, the following columns will be blank:

- CSW Office ID
- CSW Office Name
- Facility Type Category
- Facility Type

- CPS Case number
- Person ID
- Child Name
- Child DOB
- Placement Active
- Placement ID

For example:

External Recovery Account 12345 is associated to Case 1111111 and the Foster Care program. This Recovery Account meets all other criteria to be included on the DCFS Outstanding Overpayments Report. Case 1111111 does not include a Foster Care program, so the report logic that attempts to find a Foster Care program ID for Case 1111111 will not be able to determine a program ID. As a result, the above listed columns will be blank.

2.1.2 Add Case Number column to the Details tab

Add a Case Number column to display the LRS case number of the case associated to the Recovery Account as shown in Figure 2.2.1-1 .

2.2 DCFS Outstanding Overpayments Report Mockups


A	B	C	D	E
				
<h1>DCFS Outstanding Overpayments Report</h1>				
Los Angeles				
Run Date: FEB-25-19 11:55 AM				
As of Date: 02/03/2019				
Total:	0	\$0.00	\$0.00	\$0.00
Pending Period	Count	Total Original Balance	Total Recovered	Total Remaining Balance

Figure 2.2.1-1 Report- Summary Tab

DCFS Outstanding Overpayments Report																						
Run Date: MAR 29 10 11:18 AM																						
Report Period: 03/01/2015																						
Total: \$11,782,428.00 \$91,127.00 \$10,791,299.00																						
Subtotal: \$11,782,428.00 \$91,127.00 \$10,791,299.00																						
OW Office ID	OW Office Name	Recovery Account	Recovery Party	Recovery Party Name	Recovery Party Address	Family Type Category	Family Type	Case Number	OW Case Number	Process ID	OW Case	OW Case	Recovery	Recovery Status	Recovery ID	OW Pending Date	Recovery Date	Original Balance	Trust Reversal	Recovery Balance	Recovery Period	OW Status
C1	BMorris	2836238	00-42787	BETHA L THOMAS		Foster Care	Foster Family Home	LBBow	289688	03	SIHELLOS	5/17/1008	Foster Care	Re	0086089	5/18/2015	3/18/2015	\$78.00	\$0.00	\$78.00	03/01/2015-03/31/2015	Active
C1	BMorris	2836128	00-42358	LINDA AMPLUD		Foster Care	Foster Family Home	LBBow	289687	02	Caraco	1/28/2010	Foster Care	Re	0044281	1/7/2010	1/8/2015	\$109.00	\$0.00	\$109.00	03/01/2015-03/31/2015	Active
C1	WBoone	2898265	00-41529	ELLEN WOODS		Foster Care	Foster Family Home	LBBow	287090	01	OW REP BHPOM	11/26/2013	Foster Care	Re	0068210	11/17/2013	4/24/2014	\$889.00	\$0.00	\$889.00	03/01/2015-03/31/2015	Active

Figure 2.2.1-2 Report- Overpayments Detail Tab


2.2.1 Page Location

Global: Reports

Local: On Request

Task: Fiscal

2.3 Supporting Documents

Number	Functional Area	Description	Attachment
1	Reports	Update the DCFS Outstanding Overpayments Report to Include External Recovery Accounts	 DCFS Outstanding Overpayments Report

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.1	The LRS shall produce reports daily, weekly, monthly, quarterly, semi-annually, annually, and as needed, as specified by COUNTY.	This enhancement will modify the DCFS Outstanding Overpayments Report to include the appropriate population required by the counties.

3.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
NA		

4 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
NA					

5 OUTREACH

NA

6 APPENDIX



Design Document

CA SCR 205172 CIV SCR 102502 – Increase the threshold for CalWORKs Overpayments Phase 1

CalACES	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sidhant Garg
	Reviewed By	Kapil Santosh, Jyothirmayi Chavata

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/28/2018	.01	Initial Revision	Sidhant Garg

APPROVAL DATE	APPROVED VERSION	APPROVER

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1 OVERVIEW

This SCR describes the policy changes as described in the ACL 19-19 regarding the implementation of SB 726. Effective July 1, 2019, SB 726 will increase the threshold for **non-fraudulent** CalWORKs overpayments from \$35 to \$250.

The changes to the CalWORKs overpayment process pursuant to SB 726 also apply to the Refugee Cash Assistance (RCA) including Trafficking and Crime Victims Assistance Program(TCVAP).

The CalWORKs Overpayment Discharge process for **non-fraudulent** overpayments and the corresponding noticing requirements will be implemented in a later release with CA-207051 CIV-103623.

1.1 Current Design

The CalACES system does not demand the collection of CalWORKs Overpayments totaling less than \$35 from individuals responsible for the recovery account. These recovery accounts where the original claim balance is \$35 or less are marked as Terminated.

1.2 Request

Enhance the CalACES system to increase the threshold for CalWORKs overpayments from \$35 to \$250. ACL 19-19 instructs that the overpayment threshold policy applies only to closed cases and therefore, Effective July 1, 2019 the CalACES system shall not demand collection of any **non-fraudulent** overpayments totaling less than \$250 if the responsible individual(s) is no longer aided in the System under an active CalWORKs or RCA program including TCVAP.

1.3 Overview of Recommendations

This system change request will:

- 1) Introduce a new Recovery Account Investigations value in the system.
- 2) Enhance the Uncollectible Recovery Account Batch to update the **non-fraudulent** recovery accounts for CalWORKs or RCA program including TCVAP with an Outstanding balance less than \$250 as 'Suspended' and status reason as 'Policy Threshold Limit'.
- 3) Update the Overpayment Adjustment Logic to automatically start Benefit Reductions for those **non-fraudulent** Recovery Accounts that have an outstanding balance less than \$250 and the recovery account Status is 'Suspended' with the status reason of 'Policy Threshold Limit'.

1.4 Assumptions

None.

2 RECOMMENDATIONS

2.1 Recovery Account Detail

2.1.1 Overview

This update is to add new Recovery Account Investigations value in the system.

2.1.2 Description of Changes

- 1) Add a new option of 'No Fraud' within the Investigations field on the Recovery Account Detail page. This new option of 'No Fraud' will be selectable or editable for Recovery Accounts in the following Status:
 - a. Pending
 - b. New (CalACES)
 - c. Pending Approval (CalACES)
 - d. Active
 - e. Suspended
 - f. Pending Agreement (CalACES)

NOTE:

1. No Data Change will be involved in the creation of this new Recovery Account Investigations value.
2. Currently, the only field editable on Recovery Account Detail page when the Recovery Account is in Suspended Status is the Comments Section.
- 2) Update the Code Hierarchy between 'Suspended' status and the Status Reason of 'Policy Threshold Limit'.
- 3) End date the existing Status Reason 'Cash - Under \$35 – AE'.

2.1.3 Page Location

No Change.

2.1.4 Counties Impacted

All CalACES Counties.

2.1.5 Security Updates

No Change.

2.1.6 Page Mapping

No Change.

2.2 Uncollectible Recovery Account Batch

2.2.1 Overview

This enhancement is to update the Uncollectible Recovery Account Batch to update the **non-fraudulent** CalWORKs or RCA including TCVAP recovery accounts with an outstanding balance of less than \$250 as 'Suspended' with the status reason of 'Policy Threshold Limit' provided the responsible individual(s) are **no longer receiving aid** in the System under an active CalWORKs or RCA program (including TCVAP).

2.2.2 Description of Changes

- 1) Update the batch to find CalWORKs/RCA Admin Error or Client Error Recovery Accounts with an outstanding balance between \$0 and \$249 that are in 'Active' or 'Suspended' status and status reason is not 'Policy Threshold Limit', where the following conditions are true:
 - a. There is no active CalWORKs/RCA program (including TCVAP) in the System for a Responsible individual of the recovery account.
 - b. The Investigations Indicator is set to 'None' or 'No Fraud'.

Update the Status to 'Suspended' and Status Reason to 'Policy Threshold Limit'.

Following are the cause codes that batch will track:

- a. Cash - Admin Caused
- b. Cash - Customer Caused
- c. Cash - Late QR7
- d. Cash - Late SAR7

- 2) Add a comment on the Recovery Account once the Status is updated to Suspended.

2.2.3 Execution Frequency

No Change.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

All CalACES Counties.

2.2.6 Data Volume/Performance

No Change.

2.2.7 Failure Procedure/Operational Instructions

No Change.

2.2.8 Programs Impacted

CalWORKs and RCA.

2.3 Overpayment Adjustment Logic

2.3.1 Overview

The overpayment adjustment is a process where if an individual is overpaid and is eligible for benefits, then the system makes an adjustment. This adjustment is a percentage-based calculation per the cause code of the recovery account. This helps in reducing the balance of recovery account. The transaction is posted as a Benefit Reduction.

This Update is to automatically start Benefit Reductions for **non-fraudulent** Recovery Accounts that have an outstanding balance less than \$250 and the recovery account Status is 'Suspended' with the status reason of 'Policy Threshold Limit'.

2.3.2 Description of Changes

- 1) Update the Overpayment Adjustment Logic to automatically start Benefit Reductions for those **non-fraudulent** Recovery Accounts that have an outstanding balance less than \$250 and the recovery account Status is 'Suspended' with the status reason of 'Policy Threshold Limit'.

NOTE: C-IV Counties currently do benefit reductions on 'Suspended' recovery accounts only for the following status reasons, whereas LA County only on 'Active' recovery accounts.

- a. Tax Intercept
- b. Cost
- c. Expired Statute
- d. Social Security

- e. Collection Agency
- f. Unable to Locate
- g. Prison
- h. Admin Decision

With this change request (CA 205172 CIV 102502) there would be no impact to the current C-IV Counties functionality and they would add 'Policy Threshold Limit' status reason to the existing list of Status Reason for Suspended status. However, LRS will now start doing Benefit Reductions on Suspended recovery accounts with Status Reason of 'Policy Threshold Limit' Only.

NOTE: This is an already identified GAP between the two systems that will be addressed as part of a different SCR where all the Region would decide collectively to determine what changes will be migrated into CalSAWS.

2.4 Tax Intercept (CIV Only)

Update the logic for Tax Intercept job to send a delete record for recovery accounts that are currently in Tax Intercept and will be Suspended due to 'Policy Threshold Limit' because of new policy.

2.5 Generate a List for Recovery Accounts

A list of recovery accounts will be generated as part of this change request and will be provided before the change is implemented in the production. The list will identify the impacted records based on following criteria:

1. Recovery Account status is 'Active' or 'Suspended' and status reason is not 'Policy Threshold Limit'.
2. Recovery Account is associated the CalWORKs or RCA program.
3. The Cause code is either Admin error or Client error.
4. The Outstanding Balance is totaling less than \$250.
5. The Outstanding Balance is greater than \$0.
6. The Investigations Indicator is 'None'.
7. The responsible individual(s) is not aided in California under the CalWORKs or RCA program.

The listing will be provided to the counties for their review. When this SCR is implemented in production the Uncollectible recovery account batch will automatically update all the recovery accounts identified in the list as 'Suspended' and Status Reason as 'Policy Threshold Limit' because of the new policy implementation.

NOTE: This listing will cover both System created as well as External recovery accounts falling into the criteria specified above.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.11.2.12	The LRS shall discontinue collection of overpayments/over issuances once all outstanding overpayments/overissuances have been collected, there is an overpayment/overissuance claim status change to terminated, voided, or uncollectable, or the collection of the overpayment/overissuance has been deemed satisfied.	This Requirement is met by enhancing the Uncollectible Recovery Account Batch to update the CalWORKs non-fraudulent recovery accounts with an Outstanding balance under \$250 as 'Suspended' with the status reason of 'Policy Threshold Limit'.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
N/A		

5 MIGRATION IMPACTS

Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A					

6 OUTREACH

Provide Counties with a list of recovery accounts falling in below criteria:

1. The Recovery Account status is either 'Active', 'Suspended'.
2. Recovery Account was established on or after December 1, 1996
3. Recovery Account is associated the CalWORKs or RCA program.
4. The Cause code is either Admin error or Client error.

5. The Investigations Indicator is 'Investigations'.
6. The responsible individual(s) have not been aided in the System under the CalWORKs or RCA program in the past consecutive 36 months.

7 APPENDIX


None.

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Design Document

SCR CA 201148 – GR Ineligibility for
Sanctioned/Time Limited CW Person

 <small>CALIFORNIA AUTOMATED CONDENSED ELIGIBILITY SYSTEM</small>	DOCUMENT APPROVAL HISTORY	
	Prepared By	Anand Kulkarni, Yale Yee, Gabriel Trejo
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
09/26/2018	0.1	Initial Draft	Anand Kulkarni
10/01/2018	0.2	Eligibility requirements added	Yale Yee
04/03/2019	0.3	Updated document with suggested changes after review.	Sonali Sidana

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1 OVERVIEW

1.1 Current Design

Sanctioned CalWORKs participants are eligible to be determined for General Relief (GR) benefits. Time Limited CalWORKs participants are ineligible for GR benefits. Any CalWORKs participant who enters GR Board & Care facility is eligible for GR effective the 1st of the month following the month that CalWORKs was received.

1.2 Requests

- Sanctioned CalWORKs participants should be ineligible when determining GR benefits.
- Time Limited CalWORKs participants should be eligible when determining GR benefits in certain scenarios.
- A new denial NOA for GR denied participants due to CalWORKs Sanctioned reason.

1.3 Overview of Recommendations

- Sanctioned CalWORKs participants are not eligible to GR benefits.
- Time limited CalWORKs participants are eligible to GR benefits in specific situations.
- Update the Household Status Detail page to capture details of when a child leaves the home because they have been legally adopted into a different household.
- Add a new denial NOA for GR denied participants due to CalWORKs sanctioned reason.
- Modify the EDBC failure reason description for time limited CW participants.

1.4 Assumptions

1. CalWORKs Participant placed in Board and Care – The user will follow existing business process to close the CalWORKs program and open a new GR program for the participant manually and input the Board and Care facility details in the GR case.

2 RECOMMENDATIONS

2.1 Update Household Status Detail Page

2.1.1 Overview

As part of the changes with this SCR, time limited CalWORKs participants may be eligible to GR benefits in LA County if their only child moves out of the house as part of a legal adoption. To make this program assessment, the Household Status Detail page must be updated to capture the reason for leaving the household.

2.1.2 Mockup

The screenshot displays the LRS (Los Angeles Resource System) interface for the 'Household Status Detail' page. The page is for Case Name: Arisa Ohata and Case Number: 2076809. The 'Eligibility' tab is active in the top navigation. The main form area is titled 'Household Status Detail' and includes a 'Save and Return' and 'Cancel' button at the top right. The form is divided into sections: 'Establish Change Reason', 'Name', 'Living in the Home Status', 'HH Status MC Exceptions', 'Planned Departure Date', 'Begin Date', 'Expected Return Date', and 'End Date'. The 'Living in the Home Status' field is highlighted with a red box and is set to 'Permanently Out of the Home'. The 'Please select a reason' field is also highlighted with a red box and is set to 'Legally Adopted'. The 'Change Reason' field is set to 'Reported on PR/RE' and the 'Reported Date' is set to '11/01/2018'. The 'Begin Date' is set to '11/01/2018'. The 'Customer Information' sidebar on the left includes sections for 'Non Financial' and 'Household Status'. The top navigation bar includes links for Journal, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out.

Figure 2.1.2.1 - Household Status Detail Page Mockup

2.1.3 Description of Changes

- Update the “Please select a reason” field to display when the “Living in the Home Status” field is set to “Permanently Out of the Home”.
 - Under this condition, the “Please select a reason” field is optional.
 - Under this condition, the “Please select a reason” field drop down values include the following options:
 - <blank>
 - Legally Adopted

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Non-Financial / Household Status

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

No anticipated change in page usage or transaction volumes.

2.2 Sanctioned CW Participants are ineligible to GR benefits

2.2.1 Overview

A CalWORKs participant who is sanctioned in WTW is ineligible to GR benefits.

2.2.2 Description of Changes

1. Modify the GR EDBC logic to determine a CalWORKs participant to be ineligible for GR benefits if the participant is:
 - a. Sanctioned in WTWAND
 - b. Discontinued in CW (not receiving CW benefits).

Note: This logic is applicable to pending GR participants with a BDA on or after the date of implementation. A new status reason will be added as part of Recommendation 2.3.

2.2.3 Programs Impacted

General Relief

2.2.4 Performance Impacts

N/A

2.3 Add a new status reason for CW Sanction Individuals

2.3.1 Overview

A new status reason should be added when a CW individual fails for a sanction.

2.3.2 Description of Changes

Add a new status reason, 'Excluded Sanction CW Indv'. This status reason should be applied to Pending persons only.

2.3.3 Programs Impacted

General Relief

2.3.4 Performance Impacts

N/A

2.4 CW Time Limited participant eligible to GR benefits

2.4.1 Overview

A CalWORKs Time Limited participant is eligible to GR benefits when:

- a) The youngest child reaches 18 years of age, or
- b) The CalWORKs Time Limited participant is pregnant, or
- c) The CalWORKs Time Limited participant's only child is permanently out of the home and legally adopted into a different household.

2.4.2 Description of Changes

1. Modify the GR EDBC logic to determine a CalWORKs Time Limited participant, who are pending, to be eligible for GR benefits per the following:
 - a. When the youngest child, of the participant, on the CW program reaches 18 years of age, or
 - b. When the time limited CalWORKs participant is pregnant, during the second or/and third trimester, until the pregnancy is ended, or the child is born, or
 - c. When the time limited CalWORKs participant has a child and the child is legally adopted into a different household and not receiving CalWORKs. A legally adopted child is determined by a household status of 'Permanently Out of the Home' and a reason of 'Legally Adopted'.

Note - All other scenarios with a CW time limited participant will be ineligible for GR.

2.4.3 Programs Impacted

General Relief

2.4.4 Performance Impacts

N/A

2.5 Update and add status reasons for CW Time-Limited Individuals

2.5.1 Overview

A status reason, Excluded CW Indv with a child < 18 yrs, exists when a CW Time-Limited individual fails.

2.5.2 Description of Changes

1. End date the status reason, Excluded CW Indv with a child < 18 yrs, before the date of implementation.
2. Add a new status reason of 'Excluded Time Limited CW Indv' effective the date of the implementation.

This status reason should be applied to Pending persons only.

Technical Note: The same code num identifier will be used.

2.5.3 Programs Impacted

General Relief

2.5.4 Performance Impacts

N/A

2.6 New GR Denial NOA for CW Sanctioned Participant

2.6.1 Overview




Currently CW Sanctioned participants are not denied of GR benefits. With this SCR, eligibility rules will be updated to deny GR for a CW Sanctioned participant. A new denial NOA will be added to the system. This NOA will be triggered when GR is denied due to the participant Sanctioned in CalWORKs.

2.6.2 Description of Change

Create a new GR Denial NOA when the GR is denied with a failure reason 'Excluded Sanction CW Indv'. reason text, regulations, trigger conditions and supported threshold languages could be found in the attached SPD for the new denial NOA.

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Forms/NOA	GR Denial NOA SPD for CW Sanctioned participant	 NOA_Denial Reason Code_NOA ID_SPD.dc
2	Forms/NOA	GR Denial NOA for CW Sanctioned participant – Threshold language	 GR_Denial_NOA_CW _Sanctioned_Threshol
3	Forms/NOA	GR Denial NOA for CW Time Limited participants	 NOA_G414D_6925_S PD.Doc.docx

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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.11	The LRS shall generate notices and NOAs in accordance with COUNTY-specified case and individual trigger conditions.	A new Denial NOA is added to the system to Trigger for GR when the CW Sanctioned participant applies for GR.
2.8.2.21	The LRS shall determine all periods of ineligibility for the following situations: a. Intentional Program Violations; b. Sanctions; c. Penalties; d. Voluntary quit; e. Certain overpayments and/or overissuances; f. Transfer of property; g. Incarcerated minor (MC); h. SSN Disqualifiers 63-404.4; i. QC refusal to cooperate with State QC reviewer 63-505.13; j. Work Requirement disqualified 63-407; k. Work Registration/FSET/ABAWD disqualifications; l. Participants that are IPV are not entitled to CF or TCF; m. Unallowable withdrawal of a Restricted Account; n. Temporary & Permanent Homeless due to One in a Lifetime Rule; and o. Diversion count.	Sanctioned CalWORKs participants are not eligible to GR benefits. Limited CalWORKs participants are eligible to GR benefits in specific situations. A new Denial NOA for GR will be added to CalACES system.

5 MIGRATION IMPACTS

This SCR is LA county specific. There are no migration impacts.

6 OUTREACH

1. Provide a list of cases with a person who is Active on General Relief and not receiving CalWORKs on or after July 1, 2016 for the following:
 - I. The person is sanctioned in WTW.

OR

 - II. The person is Time Limited on CalWORKs when their youngest child has not reached 18 years of age or the person is pregnant and not in the second or third trimester.

Note: Add an additional column for the Discontinuance reason (sanction reason & time limited reason). If the individual has multiple Discontinuance reasons, list all the reasons in the same column.

The list will include the Standard List Columns:


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

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Design Document

SCR 201204 – EDMS: LRS Update – Image and
View Image Button URL Security Updates

	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gillian Noelle Bendicio, Howard Suksanti
	Reviewed By	Carl Moore, Long Nguyen, Balakumar Murthy, Abel Lopez, Raheem Raasikh, Christine Altavilla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/29/2019	.1	Initial Revision	Gillian Noelle Bendicio
4/1/2019	.2	Updated with Interface recommendation.	Howard Suksanti

DRAFT

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1 OVERVIEW

This System Change Request (SCR) will document the updates made to the Electronic Document Management System (EDMS) web services which allows the worker to view the application and case images. The SCR will be a joint effort between Accenture and the Information Technology Department (ITD).

1.1 Current Design

Currently, the application and case images are available for viewing through the global navigation if they are within a context of a case and through the following pages with a 'View Images' button:

1. E-Application Summary
2. Special Investigations Detail
3. Task Detail

Additionally, the Point of Service Scan Image List allows a worker to view individual scanned images from EDMS.

When accessing these images through these pages, a new window will appear and direct the user to EDMS.

1.2 Requests

The current design does not prevent the worker from copying the EDMS link and sending it to unauthorized users. This impacts confidential cases. The following request have been made to address this issue:

- Provide a one-time authentication with a timeout when accessing EDMS.
- Set up a new Web Service Operation that will be used to get a one-time login token for authentication.

1.3 Overview of Recommendations

The following recommendation has been made to address the security issue:

- Update the link generated to contain an authentication token.
- Set up a new Web Service Operation that will be used to get a one-time login token for authentication.

1.4 Assumptions

1. The 'DCFS Images' found in the global hyperlink will not be in scope for this SCR.
2. ITD Test Environments will be available to Accenture development team on or before June 23, 2019.
3. The changes required from ITD will be deployed to production on or before September 23, 2019.

2 RECOMMENDATIONS

2.1 Global Navigation – Images

2.1.1 Overview

The 'Images' link is located on the global navigation of the system. This allows the user to access EDMS and view the case documents if they are within the context of a case.

2.1.2 Description of Changes

1. Call the new EDMS web service when the user clicks on the 'Images' link to obtain the one-time use authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service with a "username" to obtain the one-time use authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time use token has already been used	Error: Authentication failed. The token is invalid.

2.1.3 Page Location

Global: Images

Local:

Task:

2.1.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.5 Page Mapping

No impact to this section.

2.1.6 Page Usage/Data Volume Impacts

No impact to this section.

2.2 e-Application Summary

2.2.1 Overview

The 'View Images' button is located at the top right of the e-Application Summary page. Clicking this button will open a new EDMS window which contains the documents associated to the e-application.

2.2.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Images' button to obtain the one-time use authentication token.

- a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service with a "username" to obtain the one-time use authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
- a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time use token has already been used	Error: Authentication failed. The token is invalid.

2.2.3 Page Location

Global: Case Info, e-Tools

Local: e-Application Search

Task:

2.2.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.5 Page Mapping

No impact to this section.

2.2.6 Page Usage/Data Volume Impacts

No impact to this section.

2.3 Special Investigation Detail

2.3.1 Overview

The 'View Images' button is located at the top right of the Special Investigation Detail page. Clicking this button will open a new EDMS window which contains the documents associated to the case with an investigation linked.

2.3.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Images' button to obtain the one-time use authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service with a "username" to obtain the one-time use authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS

The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time use token has already been used	Error: Authentication failed. The token is invalid.

2.3.3 Page Location

Global: Special Units, Special Investigations

Local: Special Investigation Search

Task:

2.3.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.3.5 Page Mapping

No impact to this section.

2.3.6 Page Usage/Data Volume Impacts

No impact to this section.

2.4 Task Detail

2.4.1 Overview

The 'View Images' button is located at the top right of the Task Detail page. Clicking this button will open a new EDMS window which contains the documents associated to the case.

2.4.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Images' button to obtain the one-time use authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service with a "username" to obtain the one-time use authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time use token has already been used	Error: Authentication failed. The token is invalid.

2.4.3 Page Location

Global: Case Info, Tasks

Local: Worklist

Task:

Note: For tasks assigned to the case worker, a hyperlink on the task will display. Otherwise, the worker will need to click on the 'Edit' button for the related task to view the Task Detail page.

2.4.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.4.5 Page Mapping

No impact to this section.

2.4.6 Page Usage/Data Volume Impacts

No impact to this section.

2.5 Point of Service Image List

2.5.1 Overview

The Point of Service Image List contains a list of documents linked to the case. Clicking one of the document links under the 'Document Type' column will open a new EDMS window containing the image of the said document.

2.5.2 Description of Changes

1. Call the new web service when the user clicks on the document link to obtain the one-time use authentication token.

- a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service with a "username" to obtain the one-time use authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
- a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time use token has already been used	Error: Authentication failed. The token is invalid.

2.5.3 Page Location

Global: Case Info, Case Summary

Local: Point of Service

Task:

2.5.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.5.5 Page Mapping

No impact to this section.

2.5.6 Page Usage/Data Volume Impacts

No impact to this section.

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2.6 Set up a new Web Service Operation on the EDMS web service.

2.6.1 Overview

The new web service operation will be added to the existing EDMS web service. The web service operation will be used to get a one-time login token for authentication.

2.6.2 Description of Change

Set up the new web service operation ('getLoginToken') that will be used to get a one-time login token for authentication.

Web Service details:

1. Operation name: 'getLoginToken'.
2. Request parameter:

getLoginToken – REQUEST			
FIELD NAME	TYPE	COMMENTS	REQUIRED
userName	String	Login username.	Y

3. Response parameter:

getLoginToken – RESPONSE			
FIELD NAME	TYPE	COMMENTS	REQUIRED
loginToken	String	Single use token string.	Y

Please refer to more details in the XSD file in the supporting document. Exception while retrieving authentication token will not be handled by the Interface. The exception will be handled by the web service caller.

Note: ITD will create an operation within current webservice to pass one-time token to construct URL.

2.6.3 Execution Frequency

Real time.

2.6.4 Key Scheduling Dependencies

N/A.

2.6.5 Counties Impacted

Los Angeles county only.

2.6.6 Data Volume/Performance

N/A.

2.6.7 Interface Partner


ITD.

2.6.8 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...)

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3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Imaging	EDMS updated XSD file.	 EdmsWebserviceService_schema.xsd

DRAFT

4 REQUIREMENTS

The SCR will update the web service that CalACES communicates with external partner - EDMS.

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.19	The LRS shall have the ability to receive data from external sources (e.g., State's SACWIS system and COUNTY-approved agencies/partners) for the purposes of establishing and maintaining a case.	The SCR will update the web service that CalACES communicates with external partner - EDMS.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

DRAFT



Design Document

SCR 203779 – Restrict FC eligibility supervisors
from authorizing their own EDBC's



DOCUMENT APPROVAL HISTORY

Prepared By	Sonali Sidana
Reviewed By	Girish Chakkingal

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
1/22/2019	1.0	Revised Document	Sonali Sidana
4/19/2019	1.1	Document updated for manual and regular EDBC.	Sonali Sidana

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DRAFT

1 OVERVIEW

EBDCs run by eligibility supervisor will now require deputy authorization to ensure that program payment amounts are reviewed by an approver independent of the eligibility supervisor who is initiating the change. The scope of this change is for Foster Care (FC) includes Approved Relative Caregiver (ARC), Kinship Guardianship Assistance Payment Program (Kin-GAP) and Adoption Assistance Program (AAP) programs supervisor pending authorization process.

The authorization approval flow will be maintained within the manage personnel functionality of CALACES.

1.1 Current Design

This document describes the Eligibility Determination Benefit Calculation (EDBC) Authorization processes within the CALACES FC, Kin-GAP and AAP programs.

Currently EDBC authorization is the process of Eligibility Worker (EW) and supervisor reviewing cases for accuracy after an EDBC has been generated by an EW or supervisor and prior to a Notice of Action (NOA) and/or Benefit(s) distributed to a participant.

Authorization is a 2-step process that will require: 1. EW authorization only or 2. EW and supervisor authorization.

1.2 Requests

Configure CALACES system to add deputy level approval to **regular and manual** EDBC to ensure that FC, Kin-GAP and AAP program payment amounts are reviewed and approved by an approver independent of the eligibility supervisor who is initiating the change.

Note: Updated design document to specify both manual and regular EDBC. Please find highlighted.

1.3 Overview of Recommendations

Regular and manual EDBC authorization is a 3-step process prior to NOA and/or Benefit(s) distributed to a participant that will require: 1. EW authorization only or 2. EW and supervisor authorization or 3. EW, supervisor, and deputy authorization.

The authorization approval flow will be maintained within the manage personnel functionality of CALACES.

1.4 Assumptions

1. Supervisor (Human Services Administrator 1 (HSA1) categorized as a supervisor in LA County, Eligibility Supervisor from Eligibility Resolution Unit / Payment Resolution Unit (ERU/PRU)) must have Deputy level position within CalACES manage personnel to authorize EDBC.
2. CALACES manage personnel functionality is flexible to allow authorized users to turn on/off controls to authorize EDBC based on business needs.
3. Existing supervisor authorization task generation will remain unchanged.
4. Manage personnel profile setup must be completed prior to implementation of CA-203779.
5. There is no impact to existing reports related to pending authorization functionality.
6. LA County, all EDBC runs require supervisor approval except for those run by staff in ERU/PRU.

2 RECOMMENDATIONS

2.1 Eligibility Rules Updates

2.1.1 Overview

For FC, AAP and KG program deputy authorization will be required for **regular and manual** EDBC run by eligibility supervisor

2.1.2 Description of Changes

EDBC rule will be updated for FC, KG and AAP programs to check the worker position and require deputy level authorization for **regular and manual** EDBCs run by eligibility supervisor.

If eligibility supervisor run EDBC for KG, FC and AAP programs, EDBC will be saved as 'Pending Authorization' EDBC. This EDBC will require deputy level authorization to be saved and authorized.

Note- The **regular or manual** EDBC processed by one supervisor cannot be authorized by another supervisor. Only worker with deputy level can authorize the same.

2.1.3 Programs Impacted

Foster Care, KIN-GAP and AAP programs will be impacted by this change.

2.1.4 Performance Impacts

No performance impacts.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.8.1.11	The LRS shall allow applications to remain pending, based upon program requirements, until eligibility is determined, and the case has been approved or denied.	By updating eligibility rule to add deputy level authorization when eligibility supervisor runs regular or manual EDBC.

4 MIGRATION IMPACTS

This change currently applies only to the CalACES system and will be configurable by county security roles after migration.



Design Document

CA SCR 206058 – Allow Need Type ‘Bus Pass –
No Valid Month’ for CalWORKs program

CalACES	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sidhant Garg
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/04/2019	.01	Initial Revision	Sidhant Garg

APPROVAL DATE	APPROVED VERSION	APPROVER

DRAFT

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1 OVERVIEW

This SCR describes the policy changes to replace the Metropolitan Transit Authority (MTA) Bus tokens with the Stored Value TAP Cards and making the corresponding updates in the CalACES system.

Fiscal Operations Division (FOD) maintains the Department's Cash Aid funds that are used to provide emergency assistance to welfare participants. These funds cover Transportation needs such as the MTA bus tokens issued to Welfare-to-Work participants. FOD's Central Cashier Unit (CCU) controls an inventory of MTA bus tokens for the District Offices' use. The District Offices' allocation of MTA bus tokens is maintained on an imprest basis. Also, bus tokens are delivered and disbursed centrally to ensure accountability and security. FOD issues an average of 90,000 bus tokens to 51 District Offices and contractors every month.

On May 25, 2018, the Auditor-Controller (A-C) released a memo to inform Departments that the Metropolitan Transit Authority (MTA) will discontinue their bus tokens and that they will no longer be sold to the County effective August 1, 2018. On July 10, 2018, the A-C issued a second memo to grant County departments an extension for the purchase of tokens until June 28, 2019. Also, tokens will be accepted by MTA until November 29, 2019. Based on FOD's discussion with the A-C, currently, their recommendation is for the bus tokens to be replaced by Stored Value (SV) TAP cards.

FOD's preliminary timeline for completion of planned activities is by June 30, 2019, to implement use of the SV TAP cards effective July 1, 2019.

1.1 Current Design

The CalACES system allows the users to create Bus Pass – No Valid Month for the following programs:

- a. Welfare-To-Work
- b. Cal-Learn
- c. REP
- d. General Relief/General Assistance

1.2 Request

Enhance the CalACES system with the Transport fare changes mandated by the Los Angeles Auditor Controller after the announcement by Metropolitan Transit Authority (MTA) that they are discontinuing the user of metal bus tokens effective June 29th, 2019. These metal bus tokens will be replaced with the Stored Value TAP Cards. The Request is to allow users to create 'Bus Pass – No Valid Month' for CalWORKs program.

1.3 Overview of Recommendations

This system change request will add new code values to category 1870 - Customer Need to Program Map to lookup the mapping for the 'Bus Pass – No Valid Month' need type and the 'CalWORKs' program.

1.4 Assumptions

- 1) The LA County will use the existing Valuable Category of 'Bus Pass – No Valid Month' for the new SV TAP Cards and Load the Valuable Inventory as required.

2 RECOMMENDATIONS

2.1 Service Arrangement Detail

2.1.1 Overview

This update is to enhance the Service Arrangement Detail page to allow user to create 'Bus Pass – No Valid Month' Need Type for CalWORKs program.

2.1.2 Description of Changes

- 1) Add new code values to category 1870 - Customer Need to Program Map to lookup the mapping for the 'Bus Pass – No Valid Month' need type and the 'CalWORKs' program.

2.1.3 Page Location

No Change.

2.1.4 Counties Impacted

Los Angeles County.

2.1.5 Security Updates

No Change.

2.1.6 Page Mapping

No Change.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.1.26	The LRS shall support multiple arrangements for payment of bus tokens, including adding the purchase amount to cash or generating issuance of bus passes/ bus tokens.	This requirement is met by enhancing the Service Arrangement Detail page to allow user to create 'Bus Pass – No Valid Month' Need Type for CalWORKs program.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
N/A		

5 MIGRATION IMPACTS

Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A					

6 OUTREACH

None.

7 APPENDIX


None.

DRAFT



Design Document

SCR CA-207999 - Architectural Changes for Time
Shift Tracking

	DOCUMENT APPROVAL HISTORY	
	Prepared By	AL
	Reviewed By	HJ/FL

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/17/2019	1.0	Initial Revision	AL
4/19/2019	1.1	Changes from test team feedback	AL
4/24/2019	1.2	Updated to show date selected by user on status message and database sync	AL
4/25/2019	1.3	Updated screenshot and formats for clarity	AL

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1 OVERVIEW

1.1 Current Design

Currently, anyone with administrative rights for a test environment (e.g. UAT, SST, etc.) could override the global time-shifted date and the time. Time shifting does not have the capability to identify the individual who performed the change.

1.2 Request

Adding the name of the person/consortium or Accenture tester that time shifted the environment last. Collecting the name of the person that advanced the current system date to a future date will help the team reach out and communicate urgent/unplanned requests for time shifting in test environments.

1.3 Overview of Recommendations

1. Update time shifter architecture to track the user that last updated the global time shifter offset.
2. Update table containing time shift information to keep a historical view of users that changed the global time shifter offset for backend analysis.
3. Update time shifter page to display the staff that last updated the global time shifter offset.
4. Update Application banner when Global Time Shift is enabled to display a message indicating this from all application pages.
5. Sync global time shift offset with database value after the application server is restarted.

1.4 Assumptions

1. Historical global time shifter data will be available since the date and time the environment database was last refreshed. Previous changes will not be tracked as they would be overridden by the normal environment database refresh process.
2. Database column "updated_on" for the global time shifter offset will reflect the System Date.
3. Syncing of the time shift offset from database will happen on the background, but can take a few minutes depending on the load on the application at the time a difference is found (normally less than 5 minutes).

2 RECOMMENDATIONS

2.1 Update Application Banner

2.1.1 Overview

Update Application Banner when Global Time Shift is enabled to display a message with such information. Hovering on the label will display additional information related to the user, data, time, date entered when the offset was updated and hostname that initiated the change (environment or developer machine hostname).

2.1.2 Application Banner Mockup



Figure 2.1.2.1 Application banner mockup

System Date: Thursday, April 25, 2019 12:13 PM

Effective Date: Friday, April 26, 2019 12:13 PM

Last updated on April 25, 2019 11:34 AM to April 26, 2019 11:34 AM by Test.User1 from mxl53811g6.calaces.org

Figure 2.1.2.1 Tooltip when hovering Global Time Shift label

Page Location

Global: /c-iv/**

2.2 Time Shifter Status Page

2.2.1 Overview

The time shifter status page will be updated to display the information on when the offset was last updated and the staff member who performed the update.

2.2.2 Time Shifter Status Page Mockup

Global TimeShifter is Active

System Date: Thursday, April 25, 2019 12:13 PM

Effective Date: Friday, April 26, 2019 12:13 PM

Date (mm/dd/yyyy):

Time (hh:mm):

Global

Last updated on April 25, 2019 11:34 AM to April 26, 2019 11:34 AM by Test.User1 from mxl53811g6.calaces.org

Unset Date

Set Date

Figure 2.2.1 – 1.1.1 Time Shifter Status Page Mockup

2.2.3 Page Location

Global: /c-iv/common/TimeShifter/status

2.3 Sync Global Time Shifter Offset with Database

2.3.1 Overview

The time shift framework will sync with the database offset to keep the value set when the application server is restarted. This feature will be turned off in architecture properties for environments where time shifting is disabled.

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.3.2.21	21. The LRS test and staging environments shall contain a distinct date advance and date rollback sub-environment that can be executed separately without interfering with the normal operation and performance of the rest of the test and staging environments.	Collecting the name of the person that advanced the current system date to a future date will help the team reach out and communicate urgent/unplanned requests for time shifting in test environments.