CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201415 | DDID 1967

DDCR 3013: Update Reissued Issuances to Follow the Original Payee and Issuance Method

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/9/2019	1.0	Initial Revision	Duke Vang
8/23/2019	1.1	Updates with comments for QA	Duke Vang
11/19/2019	1.2	Updates with content revision to all Reissue and External Reissue for EBT Cash	Duke Vang

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1 OVERVIEW

1.1 Current Design

When reissuing or replacing an issuance in CalSAWS:

- If the issuance is EBT, the Issuance Method defaults to EBT and the Payee defaults to the Program Payee.
- If the issuance is Direct Deposit, the Issuance Method defaults to Warrant and the Payee defaults to the Program Payee.
- If the issuance is Warrant, the Issuance Method defaults to Warrant and the Payee defaults to the Program Payee.

1.2 Requests

Per Design Differences Change Request (DDCR) 3013, when reissuing or replacing an issuance, the Payee and Issuance Method should follow the original issuance's original Payee and original Issuance Method.

1.3 Overview of Recommendations

All reissued and replaced issuances will be updated to follow the Payee and Issuance Method of the original issuance with a few exceptions.

1.4 Assumptions

1. Users can still change the Issuance Method after the default Issuance Method has been suggested.
2. For CalFresh Replacements, EBT will still be defaulted as the Issuance Method for Food EBT issuances even when the Payee does not have access to an Active Food EBT Account. If unchanged, the issuance will error out (Submission Error) when it is submitted to the EBT Vendor.
3. The "Foster Care Post Office Return Reissuance" functionality batch job will not be updated.
4. There will be no new additional security for the "Reissue" or "External Reissue" buttons.

2 RECOMMENDATIONS

2.1 Issuance Detail

2.1.1 Overview

All reissued and replaced issuances will be updated to follow the Payee and Issuance Method of the original issuance.

2.1.2 Issuance Detail Mockup

N/A

2.1.3 Description of Changes

1. Make the following updates to the "Reissue" and "External Reissue" functionality on the Issuance Detail page:
   a. Default the Issuance Method to match the Issuance Method of the original Issuance with the exception of the following scenarios:
      i. If the original Issuance is Cash EBT and the original Issuance Payee no longer has access to the Active Cash EBT Account, the Issuance Method will default to blank. The Worker will need to manually select a new Issuance Method.
      ii. If the original issuance is Cash EBT and the original Issuance Payee has access to the Active Cash EBT Account, the Issuance Method will default to EBT regardless of the Issuance Method of the original Issuance.
      iii. If the original Issuance is Direct Deposit, the Issuance Method will default to Warrant.
   b. Default the Payee to match the Payee of the original Issuance.
2. Make the following updates to the "Replace" functionality on the Issuance Detail page:
   a. Default the Issuance Method to match the Issuance Method of the original Issuance.
   b. Default the Payee to match the Payee of the original Issuance.
3. Update the "Reissue" button functionality to allow Cash EBT to be reissued on the Issuance Detail page.
4. Update the "External Reissue" button functionality to allow Cash EBT to be externally reissued on the Issuance Detail page.

2.1.4 Page Location

Global: Fiscal

Local: Issuances

Task: Issuance Search

2.1.5 Security Updates
N/A

2.1.6 Page Mapping
N/A

2.1.7 Page Usage/Data Volume Impacts
N/A

3   REQUIREMENTS

3.1   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1967	As Side-by-Side sessions were focused on comparing the front end (online pages) functionality of the application, the CONTRACTOR shall budget an allowance of twenty-nine thousand, one hundred fifty-five hours (29,155) to accommodate for any Unforeseen differences in the code base that result in additional requirements. The requirements for the allowance of hours must be finalized and approved by the CONSORTIUM for the CONTRACTOR to meet design, build and System Test milestones, subject to the requirements meeting requirements in the LRS Agreement. As the requirements for the designated SCRs are identified, the SCRs will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.	• Estimates will include the necessary Tasks in the software development lifecycle required to implement the CalSAWS DD&I SCR including deployment and change management. • For the new requirements to be included with CalSAWS DD&I UAT preparation activities (targeted to begin April 2021 for C-IV), the requirements for the unforeseen Differences allowance hours must be finalized. approved by the CONSORTIUM and added to the CalSAWS DD&I SOR by July 1, 2020 for the CONTRACTOR to meet design, build and System Test milestones.	All reissued and replaced issuances will be updated to follow the Payee and Issuance Method of the original issuance with a few exceptions. Furthermore, the "Reissue" and "Externally Reissue" buttons will be updated to allow Cash EBT issuances to reissued.

CalSAWS

California Statewide Automated Welfare System

DRAFT

Design Document

CA-207329 DDID 1395 – IEVS Batch Assignment
Configuration Page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/18/19	0.1	Initial Draft	Avi Bandaranayake
8/20/2019	0.2	Updated mockups and TOC based on review comments	Avi Bandaranayake
11/21/2019	0.3	Content revision to remove deceased person drop down option on IEVS assignment, adding a list of C-IV reader jobs, add mention of updating FTP jobs, add assumption for task creation.	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

Currently the IEVS Batch Assignment Configuration page is not accessible in LRS. LRS has automated batch jobs to handle each IEVS abstract assignment. For criminal IEVS abstracts (FF, CYA and NPM), a Task and a Journal entry is created and assigned to the District supervisor. For NHR, PVS or IFDS, the end result is either automated

disposition of the report or an automated assignment to an IEVS supervisor. Deceased Person (DeathMatch) will set a trigger to run batch EDBC.

NOTE: For IFDS there is complex logic that is used in determining the outcome.

1.2 Requests

Add the ability to assign out individual review types to Cases, Single Position, Random or No Assignment. This functionality shall be similar to the existing logic on the C-IV IEVS Batch Assignment Configuration Page.

1.3 Overview of Recommendations

1) Port the online IEVS Batch Assignment Configuration page from C-IV into CalSAWS.
2) Port associated batch jobs from C-IV into CalSAWS.
3) Add drop down option and update query for IEVS Assignment
4) Add page mappings for online page.
5) Enable security rights for online page.

1.4 Assumptions

There will be no validation to prevent Los Angeles County from changing the default option on the page as part of the DDID.

Changing and saving the default option on this page will have no affect to the batch jobs for Los Angeles County as part of the DDID.

Any changes to existing functionality associated with this page for Los Angeles County will be covered by separate enhancement SCRs.

Task creation for C-IV counties will not be available until completion of the task management solution.

2 RECOMMENDATIONS

2.1 IEVS Batch Assignment Configuration

2.1.1 Overview

This is a C-IV page that will be added to the CalSAWS system in order to support the existing business process of the migration counties.

2.1.2 IEVS Batch Assignment Configuration Mockups

IEVS Abstracts

IEVS Abstracts Search
IEVS Dispositions Search
IEVS Assignment
IEVS Batch Assignment
IEVS Review Case
Disposition Search

IEVS Batch Assignment Configuration

Edit

IEVS Review Type	Active Case Assignment	Active Case Reviewer ID	Closed Case Assignment	Closed Case Reviewer ID
Deceased Person	Single Position	36AS20690K	Single Position	36AS20690K
IFDS	Single Position	36AS20530Y	Single Position	36AS205313
IFDS Medical	Single Position	36AS20530Y	Single Position	36AS20530O
Fleeing Felon	Single Position	36AS20580U	Single Position	36AS20580U
New Hire	Case		Case	
Prisoner Match	Single Position	36AS205325	Single Position	36AS205325
PVS	Case		Case	

Edit

Last Updated On 11/03/2015 2:09:58 PM By: 6646

This Type 1 page took 0.19 seconds to load.

Figure 2.1.1 – IEVS Batch Assignment Configuration

Figure 2.1.2 – IEVS Batch Assignment Configuration (Edit Mode)

2.1.3 Description of Changes

1) Port over the C-IV code for the IEVS Batch Assignment Configuration page with the following columns and options:
   a. IEVS Review Type
      i. List the following: Deceased Person, IFDS, IFDS Medical, Fleeing Felon, New Hire, Prisoner Match, PVS
   b. Active Case Assignment (when in edit mode)
      i. Dropdown with the following options: Case, None, Random, Single Position
   c. Active Case Reviewer ID
      i. The ID of the user that will be assigned if the case is active. The Worker ID Link will link to the Worker Detail page.
      ii. Select button (when in edit mode): links to Select Worker page
   d. Closed Case Assignment (when in edit mode)
      i. Dropdown with the following options: Case, None, Random, Single Position
   e. Closed Case Reviewer ID

i.   The ID of the user that will be assigned if the case is closed. The Worker ID Link will link to the Worker Detail page.
ii. Select button (when in edit mode): links to Select Worker page

2.1.4 Page Location

Global: Special Units

Local: IEVS Abstracts

Task: IEVS Batch Assignment

2.1.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
IEVSBatchAssignmentEdit	Allows user to Edit and save	IEVSBatchAssignmentEdit
IEVSBatchAssignmentView	Allows user to view	IEVSBatchAssignmentView

Security Groups

Security Group	Group Description	Group to Role Mapping
IEVSBatchAssignmentEdit	Edit the configuration for assigning IEVS reports.	
IEVSBatchAssignmentView	View the configuration for assigning IEVS reports.	

2.1.6 Page Mapping

Create a new PMCR for the page and all of the fields.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 IEVS Batch Assignment

2.2.1 Overview

Existing batch jobs from C-IV that will assign IEVS abstracts depending on the option that was selected on the IEVS Batch Assignment Configuration page.

2.2.2 Description of Change

1) Port over all the C-IV batch jobs listed in Table 2.2.1. Substitute the County Code for XX in the table.
2) Port the C-IV IEVS FTP and merge with existing LRS FTP job so the reader jobs can handle data for C-IV counties and Los Angeles county.
3) Port the C-IV IEVS reader jobs listed in table 2.2.2 and merge the functionality with the LRS reader job.
4) Separate the IEVS NPM and IEVS FF LRS batch jobs into an IEVS reader job and processing jobs.

Table 2.2.1 – Batch Jobs

Job Name	Log Name (property)	Report Type (property)
PBXXC400	IevsBatchAssignment_ECS_XX	EC
PBXXC402	IevsBatchAssignment_FleeingFelon_XX	FF
PBXXC401	IevsBatchAssignment_Medical_XX	EM
PBXXC403	IevsBatchAssignment_NewHire_XX	NH
PBXXC405	IevsBatchAssignment_PVS_XX	PV
PBXXC404	IevsBatchAssignment_PrisonerMatch_XX	PM

Table 2.2.2 – FTP Jobs

Job Name	Module Name
PIXXC200	org.civ.interfaces.financials.ievsrecipient.IEVSFFM220PReader
PIXXC201	org.civ.interfaces.financials.ievsrecipient.IEVSNPM1040BReader
PIXXC401	org.civ.interfaces.financials.ifd.IFD440Reader
PIXXC400	org.civ.interfaces.financials.ievsrecipient.IEVSPVS040Reader
PIXXC500	org.civ.interfaces.financials.ievsrecipient.IEVSNHR350Reader

2.2.3   Execution Frequency

Daily

2.2.4   Key Scheduling Dependencies

No change

2.2.5   Counties Impacted

All counties

2.2.6   Data Volume/Performance

No change

2.2.7   Failure Procedure/Operational Instructions

No change

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1395	The CONTRACTOR shall add the ability to assign out individual review types to Cases, Single Position, Random or No Assignment. This functionality shall be similar to the existing logic on the C-IV IEVS Batch Assignment Configuration Page.	N/A	New page will be added to CalSAWS similar to the page in C-IV. Additional dropdown value will be added.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207427 | DDID 692 | DDID 1624

Update Eligibility Workload Inventory page

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Kim Lam
	Reviewed By	Yale Yee, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/15/2019	1.0	Initial Document	Kim Lam
11/11/2019	2.0	Added validation message to 2.1.3 Desciption of Changes	Kim Lam
11/26/2019	3.0	Updated Section 1.4 Assumptions to update Reports in another SCR	Kim Lam

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1 OVERVIEW

The Eligibility Workload Inventory page will be updated to include additional fields as well as relabel the "Go" button to say "View".

1.1 Current Design

The Eligibility Workload Inventory page has a "Go" button and does not have the "Display Workload" and "Status Effective Date" fields.

1.2 Requests

On the Eligibility Workload Inventory page:

- Per DDID 1624, relabel the "Go" button to "View".
- Per DDID 692, migrate "Display Workload" and "Status Effective Date" fields, and update default dates to display the current date.

1.3 Overview of Recommendations

On the Eligibility Workload Inventory page:

- The "Go" button on the Eligibility Workload Inventory page will be relabeled to "View".
- Fields "Display Workload" and "Status Effective Date" will be migrated, and the default dates will be updated to display the current date.

1.4 Assumptions

1. Additional updates to the Eligibility Workload Inventory page will be made with DDID 1967: DDCR 4100, currently planned for the 20.03 Release.
2. Report will be updated in another SCR (CA-212095) to have extract results match results on the Eligibility Workload Inventory page.

2 RECOMMENDATIONS

2.1 Eligibility Workload Inventory

2.1.1 Overview

On the Eligibility Workload Inventory page:

- The "Go" button on the Eligibility Workload Inventory page will be relabeled to "View" (DDID 1624)
- Fields "Display Workload" and "Status Effective Date" will be migrated, and the default dates will be updated to display the current date. (DDID 692)

2.1.2 Eligibility Workload Inventory Mockup

Figure 2.1.2.1 Eligibility Workload Inventory page

2.1.3 Description of Changes

1. Relabel the "Go" button on the Eligibility Workload Inventory page to "View." (DDID 1624)
2. Migrate the field "Display Workload" and display the current date as the default date. (DDID 692). The Display Workload field will allow the User to select as of which date to view the Workload Inventory, and filter the Search Results Summary accordingly.
3. Migrate the field "Status Effective Date", and display the current date as the default date. (DDID 692). The Status Effective Date field will allow the User to select as of which Effective Date to view the program status, and filter the Search Results Summary accordingly.

- <mark>Add validation rule to make the following validation message appear if Status Effective Date is entered as an earlier date than Display Workload date:</mark>

  <mark>The Status Effective Date must be equal to or after the Display Workload</mark>

2.1.4 Page Location

- **Global:** Eligibility
- **Local:** Workload Inventory
- **Task:** N/A

2.1.5 Security Updates

None

2.1.6 Page Mapping

Create new PMCR for "Display Workload" and "Status Effective Date" fields.

2.1.7 Page Usage/Data Volume Impacts

None

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1624	The CONTRACTOR shall relabel the "Go" button to "View" on the Eligibility Workload Inventory page.	N/A	The "Go" button on the Eligibility Workload Inventory page is relabeled to 'View".
692	The CONTRACTOR shall migrate the "Display Workload" and "Status Effective Date" fields on the Eligibility Workload Inventory page and update the default dates to display the current date.	N/A	The "Display Workload" and "Status Effective Date" fields are migrated to the Eligibility Workload Inventory page, and the default dates are updated to display the current date.