CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207116 | DDID 2276

Update the Fraud Tracking Functionality

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/15/2019	1.0	Original	Melissa Mendoza
10/24/2019	1.1	Made changes based on Workgroup feedback.	Melissa Mendoza
12/17/2019	1.2	Made updates per QA Feedback.	Melissa Mendoza
1/28/2020	1.3	Made updates per DDEL Comments	Melissa Mendoza
03/20/2020	1.4	Added Date Out field, specification on the placement of the Navigation to the table for Content Revision 1. Removed the input fields for the Special Investigation Log for the Special Investigation ID and the Case Number so they have to be selected.	Melissa Mendoza

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1 OVERVIEW

This SCR will address the need to allow Investigators to log when they leave and return for their visit in order to know when they are out of the office and know they have returned safely.

1.1 Current Design

The Special Investigations functionality allows Investigators to open an Investigation with information such as Fraud Type, Allegation, Source, Priority, Program, etc. It also keeps track of the Investigator(s) assigned and the User who created an Investigation.

1.2 Requests

Per DDID 2276, update the fraud tracking functionality to allow Investigators to log their time out and time returned when making investigative visits, and an authorized user can see an up-to-date list of Investigators currently out on visits and how long they have been gone.

New List and Detail pages will be added to the SIU Navigation to track Investigators that are out on visits.

1.3 Overview of Recommendations

Update the Special Investigations functionality to enable Investigators to log their time for an Investigation and search for specific log detail:

1. Add a new Investigation Log Search List page to enable a Worker to search the Log Detail records by Investigator within a date range.
2. Add a new Investigation Log Detail page to capture specific information about the visit.

1.4 Assumptions

New List and Detail pages will be added to the SIU Navigation to track Investigators that are out on visits.

2 RECOMMENDATIONS

2.1 Special Investigation Log Search

2.1.1 Overview

The Special Investigation Log Search page will be added to CalSAWS. The Special Investigation Log Search page will be accessed from the Special Units Global Navigation and Special Investigations Local Navigation. The Special Investigation Log Search allows the Supervisor or Worker assigned to search for Investigations by date to view records of when an Investigator is out at an Investigation.

2.1.2 Special Investigation Log Search Mockup

Special Investigation Log Search

▼ Refine Your Search

Case Number:	Case Name:	Office:
[ ] Select	[ ]	Select
Investigation ID:	**Assigned To:**	
[ ] Select	19DP70RL0J Remove	
From:	**To:**	
[ ] 📅	[ ] 📅	

Search

Results per Page: 25 ▾ Search

Add Special Investigation Log

Investigation ID	Case Number	Case Name	Assigned To	Date Out	Sign Out Time	Sign In Time
No Data Found						

Add Special Investigation Log

This Type 1 page took 0.38 seconds to load.

Figure 2.1.2.1 Special Investigation Log Search w/ Task Navigation

Special Investigation Search

Cancel

▶ Refine Your Search

Search Results Summary						Results 1 - 3 of 3

Select

	Investigation ID	Case Type	Case Number	Case Name	Assigned To	Status	Assigned Date
●	F799625854	Internal	B0Z6765	ANGELA J TESTI		Closed	
○	F799773977	Internal	SACE81F	JANET YOURTEST	19DPL8RF06	Closed	04/27/2009
○	E799951185	Internal	L090752	JESSICA TESTIN	19DPL8IK01	Closed	11/02/2016

Select

Cancel

This Type 1 page took 77.70 seconds to load.

Figure 2.1.2.2 Special Investigation Search - Select Page

Special Investigation Log Search

▶ Refine Your Search

Search Results Summary						Results 1 - 2 of 2

Add Special Investigation Log

	Investigation ID	Case Number	Case Name	Assigned To	Date Out	Sign Out Time	Sign In Time
☐	F800057896	B1VNV54	Alice Smith	19DPL8JJ0R	10/15/2019	11:30 AM	1:00 PM
☐	F800191688	LB26108	Mary Smith	19DPL8JH02	10/15/2019	12:00 PM	1:45 PM

Remove   Add Special Investigation Log

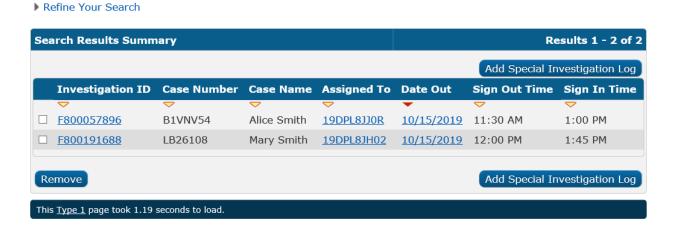This Type 1 page took 1.19 seconds to load.

Figure 2.1.2.3 Special Investigation Log Search Results

2.1.3 Description of Changes

1. The Special Investigation Log Search will be accessed by the Special Units global navigation, Special Investigations local navigation and the new Special Investigation Log Search task navigation <mark>below the Special Investigation Search navigation item</mark>.

2. Add the following validation and restriction on the Special Investigation ID field. The Special Investgation ID must be a number or an E or F followed by a number:

"Investigation ID- Investigation ID must be a number or an 'E' or 'F' followed by a number"

3. After searching Refine Your Search will be collapsed.
4. The fields in the Special Investigation Log Search and Results will be:

Field Name	Description
Case Number	Case Number associated with Special Investigation Log with a Select button to navigate to Select Person to find a Case associated to a Special Investigation. After searching and selecting a Case Number, a Remove button will allow the Worker to remove the Case Number.
Investigation ID	ID associated to the Special Investigation Log with a Select button that will navigate to Special Investigation Search and allow the User to select an Investigation. See Figure 2.1.2.2. After selecting a Special Investigation ID a Remove button will remove the ID. Hyperlink navigates to Special Investigation Detail page.
Case Name	Case Name associated to the Special Investigation.
Office	Select navigates to the Select Office page. Remove button will display instead of Select when a value is added.
Assigned To	Worker assigned to the Special Investigation Log. Defaults to the logged in Worker. Remove button allows to search without a worker. When clicking Remove a Select button will replace it. Select navigates to Select Worker page. Remove button will display instead of Select when a value is added. Hyperlink navigates to Worker Detail page.
From	Date range using the Date Out from the Special Investigation Log.
To	Date range using the Date Out from the Special Investigation Log.
Add Special Investigation Log button	Navigates to the Special Investigation Log Detail page in Create mode.
Date Out	Date Out field from the Special Investigation Log Detail page.

Sign Out Time	Sign Out Time field from the Special Investigation Log Detail page.
Sign In Time	Sign In Time field from the Special Investigation Log Detail page.
Remove Button	Removes the record.

5. The Search Results will default to sort by Date Out. Date Out will link to the Special Investigation Log Detail in View Mode.

2.1.4 Page Location

Global Navigation: Special Units

Local Navigation: Special Investigations

Task Navigation: Special Investigation Log Search

2.1.5 Security Updates

Please see the attached "CA-207116 DDID 2276 Security Matrix" document for Security Matrix.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
SpecialInvestLogSearch	Access to the Special Investigation Search page.	Special Investigation Log Search

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Special Investigation Log Search	Search Special Investigation Logs.	Special Investigations Staff, Special Investigations Supervisor, View Only, System Administrator

2.1.6 Page Mapping

PMCR for the Special Investigation Log page.

2.1.7 Page Usage/Data Volume Impacts

New functionality in the system. Estimated low level of data.

2.2 Special Investigation Log Detail Page

2.2.1 Overview

The Special Investigation Log Detail page will allow the Special Investigation Worker to log when they are out at a location with a suspect. The Worker ID will default to the logged in Worker's ID. The Phone Number will be the phone number of where the Worker can be reached.

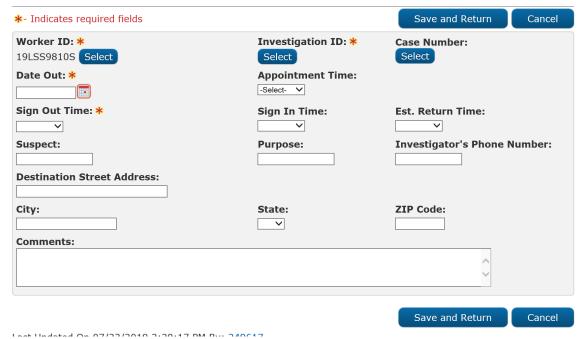## 2.2.2 Special Investigation Log Detail Mockup

Special Investigation Log Detail

✱- Indicates required fields

[Save and Return] [Cancel]

Worker ID: ✱
19LSS9810S [Select]

Investigation ID: ✱
[Select]

Case Number:
[Select]

Date Out: ✱
[_____] 📅

Appointment Time:
[-Select- ▾]

Sign Out Time: ✱
[▾]

Sign In Time:
[▾]

Est. Return Time:
[▾]

Suspect:
[_____]

Purpose:
[_____]

Investigator's Phone Number:
[_____]

Destination Street Address:
[_____]

City:
[_____]

State:
[▾]

ZIP Code:
[_____]

Comments:
[_____]

[Save and Return] [Cancel]

Last Updated On 07/23/2019 2:30:17 PM By: 349617

Figure 2.2.2.1 Special Investigation Log Detail Mockup – Create Mode

Special Investigation Log Detail

✱- Indicates required fields

[Save and Return] [Cancel]

Worker ID: ✱
19LSS9810S

Investigation ID: ✱
F800057896

Case Number:
[Select]

Date Out: ✱
10/15/2019

Appointment Time:
[-Select- ▾]

Sign Out Time: ✱
[11:30 AM ▾]

Sign In Time:
[▾]

Est. Return Time:
[▾]

Suspect:
[_____]

Purpose:
[_____]

Investigator's Phone Number:
[_____]

Destination Street Address:
[_____]

City:
[_____]

State:
[▾]

ZIP Code:
[_____]

Comments:
[_____]

[Save and Return] [Cancel]

Figure 2.2.2.2 Special Investigation Log Detail Mockup – Edit Mode

Special Investigation Log Detail

Edit   Close

Worker ID: ✱	**Investigation ID:** ✱	**Case Number:**
19LSS9810S	F800057896	L001263
Date Out: ✱	**Appointment Time:**	
10/15/2019	11:00 AM	
Sign Out Time: ✱	**Sign In Time:**	**Est. Return Time:**
10:30 AM	12:45 PM	12:30 PM
Suspect:	**Purpose:**	**Investigator's Phone Number:**
Michael Smith	Investigation	555-444-1212
Destination Street Address:		
123 Maine Street		
City:	**State:**	**ZIP Code:**
Long Beach	CA	94511
Comments:		
Comments regarding the Investigation Visit go here.		

Edit   Close

Figure 2.2.2.3 Special Investigation Log Detail Mockup – View Mode

2.2.3 Description of Changes

1. Add a new page labeled "Special Investigation Log Detail" that includes the following fields:
2. Add the following validation message if Sign In Time is set before Sign Out time when clicking Save:
   a. Sign In Time must be later than the Sign Out time.

Field Name	Description	Required
Worker ID	Default to current logged in Worker. Select button navigates to Select Worker.	Yes
Investigation ID	ID of the Investigation that relates to the Investigation Log. Select button navigates to Special Investigation Search.	Yes
Case Number	Case Number associated to the Investigation. Select button navigates to Person Search.	No
Date Out	Date the person is out on a visit.	Yes
Appointment Time	Time of scheduled appointment. Dropdown will be in 15 minute	No

Field Name	Description	Required
	increments starting at 6:00 AM and ending at 11:30 PM.	
Sign Out Time	Time the Worker leaves to the appointment. Dropdown will be in 15 minute increments starting at 6:00 AM and ending at 11:30 PM.	Yes
Sign In Time	Time the worker returns from the appointment. Dropdown will be in 15 minute increments starting at 6:00 AM and ending at 11:30 PM.	No
Est. Return Time	Estimated time the Worker plans to return from the appointment. Dropdown will be in 15 minute increments starting at 6:00 AM and ending at 11:30 PM.	No
Suspect	Name of the Suspect that the Investigator is visiting.	No
Purpose	Purpose of the visit. (Max characters 55)	No
Investigator's Phone Number	Phone Number where the Investigator can be reached.	No
Destination Street Address	Address where the Worker will be meeting with the suspect.	No
City, State, Zip	City, State (Drop-down field) , Zip where the Investigator will be meeting with the suspect.	No
Comments	Text Area field. (Use standard Comments field Max Characters)	No
Save and Return button	Adds record to the database. Navigates to Special Investigations Log Search page.	N/A
Cancel button	Navigates to Special Investigations Log Search page.	N/A
Edit button	Accesses the page in Edit Mode.	N/A
Close button	Navigates to the Special Investigations Log Search page.	N/A

2.2.4 Page Location

Global Navigation: Special Units
Local Navigation: Special Investigation Search
Task Navigation: Special Investigations Log Search

2.2.5 Security Updates

Please see the attached "CA-207116 DDID 2276 Security Matrix" document for Security Matrix.

1. Security Rights

Security Right	Right Description	Right to Group Mapping
SpecialInvestLogView	Access to the Special Investigation Log Detail page.	Special Investigation Log View
SpecialInvestLogEdit	Ability to create and edit a Special Investigation Detail record.	Special Investigation Log Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Special Investigation Log View	View the Special Investigation Log Detail page.	Special Investigations Staff, Special Investigations Supervisor, View Only, System Administrator
Special Investigation Log Edit	Edit the Special Investigation Log Detail page.	Special Investigations Staff, Special Investigations Supervisor, View Only, System Administrator

2.2.6 Page Mapping

Add page mapping for new Special Investigation Log Detail page.

2.2.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2276	The CONTRACTOR shall update the fraud tracking functionality to allow investigators to log their time out and time returned when making investigative visits, and an authorized users can see an up-to-date list of investigators currently out on visits and how long they have been gone.	New List and Detail pages will be added to the SIU Navigation to track Investigators that are out on visits.	Create a new page called Special Investigation Log Search page and Special Investigation Log Detail page.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207217 | DDID 2057

Display customer age and gender after name

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Linda Zeng
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
10/01/2019	1.0	Original	Linda Zeng
01/14/2020	1.1	Deleted page "Service Arrangement Detail" from list in section 2.5.3.1	Linda Zeng
01/15/2020	1.3	Updated the following sections per ClearBest: 2.1.2, 2.1.3; 2.8.3.2; deleted 2.2.3.1.1.2; updated 2.2.4	Linda Zeng
01/16/2020	1.4	Content Revision to section 2.1.3 to add Kin-Gap detail pages	Linda Zeng
01/28/2020	2.0	Added "N/A" to "Local" and "Task" navigations in section 2.7.4 per ClearBest	Linda Zeng
02/04/2020	2.1	Content Revision to address pages which were partially or completely updated with previous releases of DDID 2057. The following sections were updated: 2,1.3, 2.2, 2.2.1, 2.2.3, 2.3.3, 2.4.3, 2.5.3; deleted section for Resource Databank Global Navigation Pages	Linda Zeng
03/16/2020	2.2	Content Revision to add the following pages: • Authorized Representative List • Authorized Representative Program Detail • Authorized Representative Detail • Employment Status Detail • Person Search • WPR Sample Detail Removed the following page: • Unmatched SSI/SSA Search • Hearing Search Results Summary • Person Search Results Summary (duplicate removed) • GR Work Requirement List • GR Sanctionable Non-Compliances	Linda Zeng

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		• Foster Care Non-Minor Dependent List • Kin-GAP Special Care Increment Detail • Kin-GAP Additional Rate Detail	

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1   OVERVIEW

This SCR updates the display of a person name throughout CalSAWS online pages to reflect the standard of Last Name, First Name, Age and Gender. This update is implemented through multiple SCRs and releases, and the pages to be updated are reflected in each design.

SCR CA-210012 and CA-210010 updated other pages in previous releases.

1.1   Current Design

The online pages throughout the system display the person's first and last name, age and gender in the dropdown fields of the data collection pages.

1.2   Requests

Per DDID 2057 display the age and gender after the name of the customer throughout the data collection pages once the user saves the page. This would include both View and Edit mode of the Detail pages as well as the List pages.

1.3   Overview of Recommendations

Update the person name on the pages to display in the following format: Last Name, First Name Age Gender.

1.4   Assumptions

1) This information will not appear when the name is stored in different fields, i.e. separate fields for First Name, Middle Name/Initial, Last Name.
2) If the Date of Birth and/or gender is not stored in the system, it will not display.

3) If the Last Name, First Name, Age and Gender are all displayed within the section then the name will not be updated.
4) Gender will display per current system functionality as follows:
   - 'M' for Male or Transgender: Male to Female
   - 'F' for Female or Transgender: Female to Male

2 RECOMMENDATIONS

2.1 Eligibility Global Navigation Pages

2.1.1 Overview

Update applicable pages under the Customer Information and Case Summary Local Navigations to display the person name as Last Name, First Name Age Gender.

2.1.2 Child Welfare Services Authority Detail Mockup

Child Welfare Services Authority Detail

✱- Indicates required fields   FC 3A Worksheet   Save   Cancel

Child's Name: ✱
Doe, Jane 12F
The child was legally removed from the home of a parent or relative by Child Welfare Services Court Order.

Begin Date: ✱   **End Date:**

SW/PO Name :   Select   **CWS/CMS Case Number:**

Figure 2.1.1 – Child Welfare Services Authority Detail Mockup

2.1.3 Description of Changes

1. Update the following pages to display the person's name as Last Name, First Name Age Gender, using the Child Welfare Services Authority Detail mockup as example:
   1. Effective Dating Confirmation List
   2. Authorized Representative List
   3. Authorized Representative Program Detail
   4. Authorized Representative Detail
   5. Employment Status Detail

2.1.4 Page Location

Global: Eligibility

Local: Customer Information/ Case Summary

Task: (Various)

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Child Care Global Navigation Pages

2.2.1 Overview

Update applicable pages under the Child Care Global Navigation to display the person name as Last Name, First Name Age Gender.

2.2.2 Child Care Workload Inventory Mockup

Figure 2.2.1 – Child Care Workload Inventory Mockup

2.2.3 Description of Changes

1. Update the following Child Care task pages to display the person name as Last Name, First Name Age Gender whenever a person's name appears on a page. Use the example of the Child Care Workload Inventory mockup above for the following pages:
   1. Certificate Search
      - <mark>Note: Update Payee result field (expand Refine Your Search, Search by: Payee, Payee: Person)</mark>
   2. Child Care Customer Reporting List
   3. Manual Reimbursement Request
   4. Child Care Wait List Search
   5. <mark>Child Care Request Detail</mark>

2.2.4 Page Location

Global: Child Care

Local: Case Summary, <mark>APP,</mark> Reporting, Wait List

Task: (Various)

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Fiscal Global Navigation Pages

2.3.1 Overview

Update applicable pages under the Fiscal Global Navigation to display the person name as Last Name, First Name Age Gender.
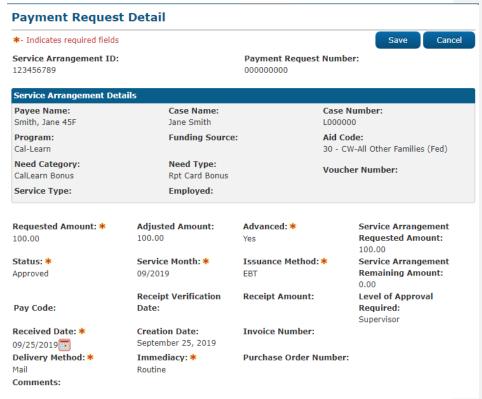
2.3.2 Payment Request Detail Mockup

Payment Request Detail

*- Indicates required fields   [Save] [Cancel]

Service Arrangement ID: **Payment Request Number:**
123456789   000000000

Service Arrangement Details		
Payee Name: Smith, Jane 45F	**Case Name:** Jane Smith	**Case Number:** L000000
Program: Cal-Learn	**Funding Source:**	**Aid Code:** 30 - CW-All Other Families (Fed)
Need Category: CalLearn Bonus	**Need Type:** Rpt Card Bonus	**Voucher Number:**
Service Type:	**Employed:**	

Requested Amount: * 100.00	**Adjusted Amount:** 100.00	**Advanced:** * Yes	**Service Arrangement Requested Amount:** 100.00
Status: * Approved	**Service Month:** * 09/2019	**Issuance Method:** * EBT	**Service Arrangement Remaining Amount:** 0.00
Pay Code:	**Receipt Verification Date:**	**Receipt Amount:**	**Level of Approval Required:** Supervisor
Received Date: * 09/25/2019	**Creation Date:** September 25, 2019	**Invoice Number:**	
Delivery Method: * Mail	**Immediacy:** * Routine	**Purchase Order Number:**	
Comments:			

Figure 2.3.1 – Payment Request Detail Mockup under Payment Requests Local Navigation

2.3.3 Description of Changes

1. Update pages under the Fiscal Global Navigation to display the person name as Last Name, First Name Age Gender whenever a person's name appears on a page. Use the example of Payment Request Detail page above for the following pages:
    1. Payment Request Search
    2. Payment Request Detail
    3. Service Arrangement Search
        - Note: Update Payee result field (expand Refine Your Search, Search by: Payee, Payee: Person)
    4. Select Person Search Result
    5. Receipt Search
    6. Create Receipt

7. Receipt Detail
8. Receipt Mass Upload Search
9. Receipt Mass Upload
10. Receipt Mass Upload Detail
11. Recovery Account Detail
12. Levy Detail
13. Foster Care Trust Fund Detail
14. Care and Maintenance Fund Detail
15. Tax Intercept Account Search
16. Tax Intercept Account Detail
17. Treasurer and Tax Collector Account Search
18. Treasurer and Tax Collector Account Detail
   - Note: Throughout Collections task pages, update the Responsible Party or Responsible Person fields.
19. Issuance Search
20. Pending Distribution List
21. Placement Verification Search
22. Invoice Print
23. EBT Card Print List
   - Note: Update the Card Holder field.

2.3.4 Page Location

Global: Fiscal

Local: Payment Requests, Collections, Issuances, Invoice, EBT

Task: (Various)

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Special Units Global Navigation Pages

2.4.1 Overview

Update applicable pages under the Special Units Global Navigation to display the person name as Last Name, First Name Age Gender.

WPR Sample Detail

✳- Indicates required fields   [Edit] [Close]

Case Information		
Review Number: A11155	**Report Month:** 01/2017	**Sample Type:** State
Case Number: 1234567	**Case Name:** Case Name	

Person Type: Head of Household	**Name:** Doe, Jane 54F	**Reviewed:** ✳ No	**Overriden:** No

Figure 2.4.1 – WPR Sample Detail Mockup

2.4.3 Description of Changes

1. Update pages under the Special Units Global Navigation to display the person name as Last Name, First Name Age Gender whenever a person's name appears on a page. Use the example of WPR Sample Detail page above for the following pages:
   1. SSIAP Workload Inventory
   2. Person Search Results Summary
   3. WPR Sample Summary
   4. WPR Sample Detail
   5. SFIS Results Search Results Summary
   6. Fingerprint Detail
   7. Lump Sum Search

2.4.4 Page Location

Global: Special Units

Local: SSIAP Workload Inventory, State Hearings, WPR Sample, SFIS Search, SSIAP

Task: (Various)

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Reception Log Page

2.5.1 Overview

Update the Reception Log external page on the Quick Links block on the CalSAWS homepage to display the person name as Last Name, First Name Age Gender.
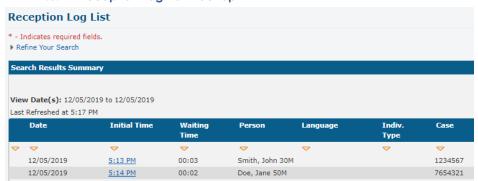
2.5.2 Reception Log List Mockup

Reception Log List

* - Indicates required fields.
▸ Refine Your Search

Search Results Summary

View Date(s): 12/05/2019 to 12/05/2019
Last Refreshed at 5:17 PM

	Date	Initial Time	Waiting Time	Person	Language	Indiv. Type	Case
▽	▽	▽	▽	▽	▽	▽	▽
	12/05/2019	5:13 PM	00:03	Smith, John 30M			1234567
	12/05/2019	5:14 PM	00:02	Doe, Jane 50M			7654321

Figure 2.5.1 – Reception Log List Mockup (truncated for size)

2.5.3 Description of Change

1. Update the Reception Log List page on the CalSAWS homepage to display the person name as Last Name, First Name Age Gender.

2.5.4 Page Location

Global: CalSAWS homepage > Quick Links
Local: N/A
Task: N/A

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 <Program> EDBC Pages

2.6.1 Overview

Update applicable <Program> EDBC Pages to display the person name as Last Name, First Name Age Gender.

2.6.2 CalWORKS EDBC Summary Mockup

CalWORKs EDBC Summary

*- Indicates required fields   [Accept] [Cancel]

Begin Month	End Month	Run Date	Run Status	Accepted By
11/2019		10/09/2019	Not Accepted	Linda Zeng

EDBC Information

Semi-Annual Reporting Period Begin Month: 09/2019

Reporting Type Reason:

Type: Regular

Recalculation: No

Program Configuration

System Determination

EDBC Source: Online EDBC Rules

Aid Code: 30 - CW-All Other Families (Fed)

Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Smith, Jane 17F	09/01/2002	MEM		Active	

[Override Program Configuration]

Figure 2.6.1 – CalWORKS EDBC Summary Mockup

2.6.3 Description of Change

1. Update <Program> EDBC pages to display the person name as Last Name, First Name Age Gender whenever a person's name appears on a page. Use the example of CalWORKS EDBC Summary page above for the following EDBC pages:
   1. <mark>Person Search</mark>
   2. <Program> EDBC Summary
   3. <Program> EDBC Summary (Manual)
   4. <Program> EDBC Detail (Manual)
   5. <Program> EDBC List (Manual)
   6. Individual Detail
   7. EDBC Person Line Item Detail (assuming a single update)
   8. Unit Size Detail
   9. WINS Detail
   10. <Program> EDBC Override Detail
   11. <Program> EDBC Override List
   12. Program Configuration List
   13. Program Configuration Detail
   14. Program Configuration Override List
   15. Program Configuration Override Detail
   16. CFAP Calculation Detail
   17. Infant Supplemental Payment Detail
   18. Negative Action Detail
        - Note: Negative Action Detail page is accessed via Case Info > Case Summary or Eligibility > Case Summary (Not Customer Information)
   19. Pickle Disregard Detail
   20. Property Detail
   21. Sneede EDBC Summary – MC Income Sneede
   22. Special Care Increment Proration Detail
2. <mark>Summary pages with multiple, expandable blocks that display customer name multiple times should display new name format in each block.</mark>

2.6.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC or Manual EDBC

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

N/A

2.6.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2057	The CONTRACTOR shall display the age and gender after the name of the customer throughout the data collection pages once the user saves the page.	This information will not appear when the name is stored in different fields, i.e. First Name, MI, Last Name.	Update Names throughout the Data Collection pages to display as Last Name, First Name Age Gender.

California Statewide Automated Welfare System

Design Document

CA-207250 | DDID1787

Migrate C-IV County Specific Batch Jobs

Phase 2

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
11/10/2019	1.0	Initial Draft	Avi Bandaranayake
2/25/2020	2.0	Updates to associate DDID 1789	Avi Bandaranayake

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1 OVERVIEW

There are currently 5,158 C-IV batch jobs identified as needing to be evaluated for migration into CalSAWS. This DDID is Phase 2 of a three-phase effort to evaluate 1,573 active C-IV batch jobs for migration into CalSAWS. The batch jobs identified by this DDID cover a variety of functional areas.

1.1 Current Design

The jobs identified in Supporting Document 1 are batch jobs that currently exist only in the C-IV system. Also known as C-IV Jobs.

The jobs identified in Supporting Document 2 are batch jobs that exist in both C-IV and CalSAWS. Also known as Common Jobs.

1.2 Requests

Per DDID 1787, migrate the C-IV County Specific Batch Jobs into CalSAWS.

Per DDID 1789, update the Batch scheduler with new jobs created for 58 counties.

1.3 Overview of Recommendations

1. Identify batch jobs that are currently active in the C-IV system that do not exist in CalSAWS.
2. Identify batch jobs that are currently active in both the C-IV and CalSAWS systems.
3. Port over C-IV code and batch jobs identified in Supporting Document 1.
4. Verify configuration and batch properties for jobs listed in Supporting Document 2.
5. All non-county specific batch jobs will be updated to run for all 58 counties.

1.4 Assumptions

1. Scheduling of any migrated batch jobs in will be handled by DDID 1789.
2. The 5,158 jobs identified include active and inactive jobs. The inactive jobs will be identified during development. The final number of jobs to be migrated may be less than the initial count identified.

2 RECOMMENDATIONS

2.1 C-IV Jobs

2.1.1 Overview

The C-IV jobs identified will be listed in Supporting Document 1. These will be migrated and configured to run in CalSAWS.

2.1.2 Description of Change

1. For each batch job listed in Supporting Document 1:
   a. Port any code associated with the jobs.
   b. Update associated configurations and properties.
2. '00' jobs: Majority of these jobs will fall under Common Jobs and will have the configuration and properties updated to include C-IV and CalWIN counties.
3. County 'XX' jobs (County-specific jobs):
   a. If the job is only specific to one county and has no overlap in either system, the batch job will remain unchanged.
   b. If the batch job exists for multiple counties or exists in both systems and is functionally and logically the same, then these will be converted to a '00' job with a county parameter list to handle the multiple counties.
4. If new jobs are created to support 58 counties add these jobs to the batch scheduler.

2.1.3 Execution Frequency

Varies. Refer to associated BSCR for details.

2.1.4 Key Scheduling Dependencies

Varies. Refer to associated BSCR for details.

2.1.5 Counties Impacted

All Counties.

2.1.6 Data Volume/Performance

No Change.

2.1.7 Failure Procedure/Operational Instructions

No Change.

2.2 Common Jobs

2.2.1 Overview

The Common Jobs identified will be listed in Supporting Document 2. These will be inspected for configuration and batch property discrepancies. Any jobs identified as having discrepancies will be updated so that the job continues to run for all counties.

2.2.2 Description of Change

1. Compare the batch job configuration between C-IV and CalSAWS.
2. If any discrepancies are found, merge configurations to allow the job to run for all counties.
3. Compare the batch job properties between the two systems.
4. If any discrepancies are found, merge properties to allow the job to run for all counties.
5. '00' jobs: Majority of these jobs will fall under Common Jobs and will have the configuration and properties updated to include C-IV and CalWIN counties.
6. County 'XX' jobs (County-specific jobs):
   a. If the job is only specific to one county and has no overlap in either system, the batch job will remain unchanged.
   b. If the batch job exists for multiple counties or exists in both systems and is functionally and logically the same, then these will be converted to a '00' job with a county parameter list to handle the multiple counties.
7. If new jobs are created to support 58 counties add these jobs to the batch scheduler.

2.2.3 Execution Frequency

Varies. Refer to associated BSCR for details.

2.2.4 Key Scheduling Dependencies

Varies. Refer to associated BSCR for details.

2.2.5 Counties Impacted

All Counties.

2.2.6 Data Volume/Performance

No Change.

2.2.7 Interface Partner

No Change.

2.2.8 Failure Procedure/Operational Instructions

No Change.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Batch	List of C-IV jobs to be migrated	SupportingDocument1C-IVJobs.xlsx
2	Batch	List of Common jobs to be merged	SupportingDocument2CommonJobs.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1787	The CONTRACTOR shall migrate the C-IV County Specific Batch Jobs across the impacted Batch modules into the CalSAWS Software as determined during the migration design phase.	• All 58 counties will be incorporated into the same batch schedule. • The jobs that are new since side by side will be migrated into the CalSAWS System. • C-IV County interfaces that were included in LRS baseline will not require functional updates. • The Batch properties and scheduling will have to be	C-IV County specific batch jobs will be migrated to CalSAWS through multiple SCRs.

		updated for each wave separately.	
1789	The CONTRACTOR shall update the CalSAWS Batch Scheduler to account for all the new CalSAWS Batch Jobs that are applicable to all 58 Counties.	- There will be one combined Batch Scheduler for all 58 Counties. - All non County-specific Batch jobs that exist in LRS will run for all 58 Counties, unless otherwise specified in other DDIDs to be County configurable. - The CalSAWS batch schedule will be run nightly, excluding holiday and system down days, unless otherwise agreed to by the Consortia. - The Batch properties and scheduling will have to be updated for each wave separately	New jobs are added to the scheduler. Non county jobs will be updated to run for all counties.