CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201968 | DDID 1967 | DDCR 4099

Add WTW Activity Attendance and Progress Forms

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz, Farhat Ulain
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/10/2020	1.0	Initial Revision	Rainier Dela Cruz
07/27/2020	1.1	Updates from Deliverable and Build comments.	Rainier Dela Cruz
08/06/2020	1.2	Updates from Deliverable and Build comments.	Rainier Dela Cruz
08/19/2020	1.3	Updates from Deliverable and Build comments.	Farhat Ulain
08/20/2020	1.4	Added clarification for the dynamic section for the CSF 126.	Rainier Dela Cruz
08/27/2020	1.5	Added a clarification on the status of the WTW program for the batch process.	Rainier Dela Cruz
09/15/2020	1.6	Updates for Content Revision 1. Updates have been highlighted.	Melissa Mendoza
09/17/2020	1.7	Added an assumption about the activity type population on the form and added a clarification note under the CSF 126 Form section.	Rainier Dela Cruz

Table of Contents

1 OVERVIEW

1.1 Current Design

In C-IV, the following forms are used to track progress of Welfare-to-Work (WTW) activities: WTW 733.4, WTW 735.2, WTW 753A, WTW 751.1 and the WEX 6. When the WTW 733.4, WTW 735.2, and WTW 753A forms are sent out, they are, in turn, tracked on the Employment Services Customer Reporting page. The page also tracks the completeness of the form when the form is returned by the recipient. The Employment Services Customer Reporting Report will pull information from the Employment Services Customer Reporting page and provide detailed information for WTW 733.4, WTW 735.2, and WTW 753A by status for a specified benefit month and county. There are also batch processes to automatically generate and send out the WTW 733.4 and 735.2 forms.

1.2 Requests

Migrate the existing forms, pages, and batch processes used in tracking WTW activities from C-IV to LRS/CalSAWS.

1.3 Overview of Recommendations

1. Add the new Generate Document Customer Activity table.
2. Create the CSF 124 form **Welfare-to-Work Program Attendance and Progress Report** based on the C-IV WTW 733.4 form.
3. Create the CSF 125 form **Welfare-to-Work School Attendance Report** based on the C-IV WTW 735.2 form.
4. Create the CSF 126 form **Travel Assistance Claim** based on the C-IV WTW 753A form.
5. Create the CSF 127 form **Return Travel Claim** based on the C-IV WTW 751.1 form.
6. Create the CSF 128 form **Subsidized WEX Time and Attendance Report** based on the C-IV WEX 6 form.
7. Migrate the automated batch process that is used to send out the WTW 733.4 and modify it to send out the CSF 124 form.
8. Migrate the automated batch process that sends out the WTW 735.2 and modify it to send out the CSF 125 form.
9. Migrate the Employment Services Customer Reporting List page.
10. Migrate the Employment Services Customer Reporting Detail page.
11. Migrate the Employment Services Monthly Productivity List Page.

1.4 Assumptions

1. The CSF 124, CSF 125, CSF 126, CSF 127, and CSF 128 forms will only be in English and Spanish.
2. The logic to retrieve the Business Reply Mail (BRM) address for the 57 Migration Counties will be implemented with SCR **CA-201214**. The population logic for

the WTW forms will use this logic to retrieve the BRM address and then will populate the field on the coversheet.

3. The migration of the Employment Services Customer Reporting report will be addressed with **DDID 1056**.
4. The existing LA County process of tracking the GN 6070, GN 6365, and GN 6008 forms will not be changed with this SCR. The forms will continue to be tracked from the 'Customer Reporting' pages. The shift from tracking these forms from the 'Customer Reporting' pages to the new 'Employment Services Customer Reporting' pages will be addressed by SCR **CA-218236**.
5. All batch scheduling will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605, for counties that have opted into the batch job.
6. The scheduling SCRs mentioned above will cover the opt in/out functionality for the CalWIN counties and can be verified once implemented.
7. These WTW forms will use the existing tracking barcode in LRS/CalSAWS and can be tested using the Barcode Routing Detail page. These forms will not use the single imaging/tracking barcode from C-IV until SCR **CA-207108** is implemented. Imagining testing cannot be done until the imagining solutions for CalSAWS has been implemented.
8. When the WTW forms are generated in Spanish, the Activity Type will populate in English.

2 RECOMMENDATIONS

2.1 Add the Generate Document Customer Activity Table

2.1.1 Overview

Currently in C-IV, when one of the forms used to track WTW activities is generated and saved, a record is inserted into the Generate Document Customer Activity table. The purpose of this table is to keep track of which form generated for a certain WTW activity and is used for page validation on the document parameters pages and driving queries for the automated batch processes defined in the later sections.

2.1.2 Description of Change

1. Create a new Generate Document Customer Activity table. The new table will contain at minimum the following data points:
    a. Generate Document Id – This is the Generate Document Id of the generated form.
    b. Customer Activity Id – This is the Customer Activity Id of the WTW activity for which the form is generated for.

    Technical Note: It is at the developer's discretion to add additional data points and data constraints as necessary to accommodate the functional and technical needs of this table.

2. Update the forms save logic to create a record in the table when the CSF 124, CSF 125, or CSF 126 is generated and saved from Template Repository (saved and printed locally or saved and printed centrally).
    a. The Generate Doc Id will be the Generate Doc Id of the form that was saved.
    b. The Customer Activity Id will be the Id of the activity selected from the Document Parameter page.
    c. When the CSF 126 is generated from Template Repository, multiple activities can be selected for the report month. A record will be created for each activity and will be associated to the same Generate Doc Id.

3. Update the Forms Generation job to create a record in the table when the CSF 124 or CSF 125 is generated through the automated batch process.
    a. The Generate Doc Id will be the Generate Doc Id of the form that was generated.
    b. The Customer Activity Id will be the Id of the activity that was returned by the driving query.

2.2 Add the CSF 124 Form

2.2.1 Overview

Add the CSF 124 form to LRS/CalSAWS Template Repository.

Form: CSF 124 (11/20)
Programs: WTW
Attached Forms: N/A
Forms Category: Forms
Languages: English, Spanish

2.2.2 Description of Change

1. Create the CSF 124 form. This form is based off the C-IV WTW 733.4 form. It will have a coversheet, with the BRM address on the second page. The form will have four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #1**
   Form Footer: Please refer to **Section 3.0 Supporting Document #1**
   Form Title: Welfare-to-Work Program Attendance and Progress Report
   Form Number: CSF 124
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #1**

2. Add the CSF 124 form to Template Repository.
   a. Create a new Document Parameters page with the following required parameters that will be used to generate the CSF 124 form:

Figure 2.2.1 – Document Parameters Page

Document Parameter	Value
Case Number	The case number for the case which the user wants to generate the form for.
Report Month	The report month (MM/YYYY) the user is generating for.
Customer Name	The dropdown contains the names of the persons.
Activity	The dropdown with a list of WTW activities link to the person selected in the Customer Name dropdown for the report month. The dropdown values will be in the following format: [Activity Type] [Start Date] – [End Date]. **Note:** When generating the CSF 124, only one activity can be selected from the dropdown.
Program	The dropdown contains the list of programs.
Language	The dropdown contains the list of languages the form can be generated in.

b. Add ‘Get Activities’ button on the Document Parameters page. When clicked, the logic will populate the Activity dropdown based on the Case, Report Month, and Customer Name selected.
c. Add the following validations to the Document Parameters page.
   i. Display the following validation message when the ‘Get Activities’ button is clicked and either the Report Month is not filled in or the Customer Name is not selected: ‘Customer Name and Report Month must be selected before retrieving activities.’
   ii. Display the following validation message when the user attempts to generate the form for the same month, language, customer, and activity, when there is one already generated: ‘<FormNumber> has been sent for this Report Month, activity, and language. Please reprint if another is needed.’ <Form Name> is a variable that will be populated with the form number.
d. This form will only be available to the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 124 – Page 1, Page 3	**County Name**	This field will be populated with the county name.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CSF 124 – Page 1, Page 3	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 124 – Page 1, Page 3	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y	Y
CSF 124 – Page 1, Page 3	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CSF 124 – Page 1, Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y	Y
CSF 124 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Activity Type**	When generated from the Template Repository, it is the activity type of the activity selected on the Document Parameters page. When generated through batch, it is the activity type of the activity returned	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		by the driving query.			
CSF 124 – Page 3, Page 4	**Activity Id**	When generated from the Template Repository, it is the activity Id of the activity selected on the Document Parameters page. When generated through batch, it is the activity Id of the activity returned by the driving query.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Provider**	When generated from the Template Repository, it is the provider associated to the activity selected on the Document Parameters page. When generated through batch, it is the provider associated to the activity returned by the driving query.	Y	Y	Y
CSF 124 – Page 3, Page 4	**Phone Number**	When generated from the Template Repository, it is the phone	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		number associated to the activity selected on the Document Parameters page. When generated through batch, it is the phone number associated to the activity returned by the driving query.			
CSF 124 – Page 3, Page 4	**Month/Year**	When generated from the Template Repository, it is the report month on the Document Parameters page. When generated through batch, it is the batch month.	Y	Y	Y

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	When generated through the batch process, the WTW Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

7. Create an Employment Services Customer Reporting entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 124
Report Month	The report month.
Name	The customer name.
Type	CSF 124 **Technical Note:** The code num identifier use in C-IV is 'WPA' and is currently available in LRS/CalSAWS.
Provider	The provider associated to the activity.
Status	Employment Services Customer Reporting Status Employment Services Customer Reporting Statuses: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error

	For example: The status will be set to “Sent” if the form is generated and sent to the recipient through Batch.
Status Date	The date of the latest (and/or most) recent status.

8. Create a Journal entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 124
Case Id	The case Id of the current case.
Type	Document
Category	All
Short Description	CSF 124
Long Description	The CSF 124 was sent for the month of [Report Month (MM/YYYY)] for [Activity Type] – [Activity Number] at [Provider Name].
Created by	User or batch
Updated by	User or batch

2.3 Add the CSF 125 Form

2.3.1 Overview

Add the CSF 125 form to LRS/CalSAWS Template Repository.

Form: CSF 125 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.3.2 Description of Change

1. Create the CSF 125 form based off the WTW 735.2 form. The form will have a coversheet, with the BRM address on the second page. The form will have four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #2**

Form Footer: Please refer to **Section 3.0 Supporting Document #2**
Form Title: Welfare-to-Work School Attendance Report
Form Number: CSF 125
Include NA Back 9: No
Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #2**

2. Add the CSF 125 form to Template Repository.
   a. It will use the Document Parameters page defined in **Section 2.2.2.2.**
      Note: When generating the CSF 125, only one activity can be selected from the dropdown.

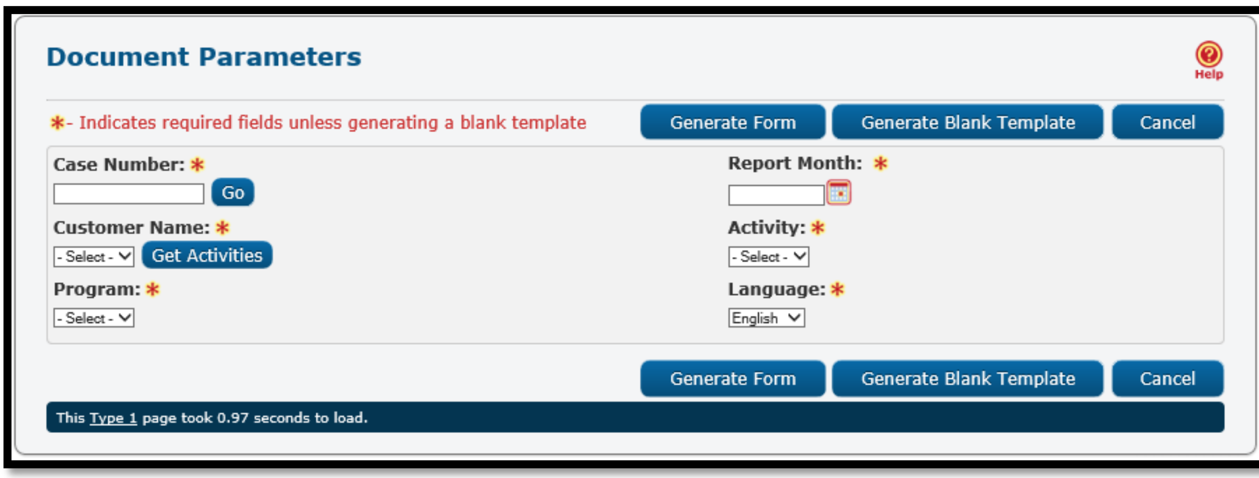


Figure 2.2.1 – Document Parameters Page

   b. This form will only be available to the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 1, Page 3	**County Name**	This field will be populated with the county name.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Office Address**	This field will be populated with the office address of the worker assigned.	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 1, Page 3	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y	Y
CSF 125 – Page 1, Page 3	**Case Name**	This field will be populated with the case name of the current case.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Case Number**	This field will be populated with the case number of the current case.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
CSF 125 – Page 1, Page 3	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y	Y
CSF 125 – Page 1, Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y	Y
CSF 125 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y	Y
CSF 125 – Page 3	**Activity Type**	When generated from the Template Repository, it is the activity type associated to the activity selected on the Document Parameters page. When generated through batch, it is the activity type associated to the activity returned by the driving query.	Y	Y	Y
CSF 125 – Page 3	**Activity Id**	When generated from the Template Repository, it is the activity Id associated to the activity selected on the Document	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		Parameters page. When generated through batch, it is the activity Id associated to the activity returned by the driving query.			
CSF 125 – Page 3	**School-Provider**	When generated from the Template Repository, it is the school provider associated to the activity selected on the Document Parameters page. When generated through batch, it is the school provider associated to the activity returned by the driving query.	Y	Y	Y
CSF 125 – Page 3	**Report Month**	When generated from the Template Repository, it is the report month on the Document Parameters page. When generated through batch, it	Y	Y	Y

Section	Field	Population	Populates from Template Repository	Populates with Form Generation	Editable from Template Repository
		is the batch month.			
CSF 125 – Page 3, Page 4	**Attendance Date**	Each row of the column will be populated with days of the report month. For example, if the report month is 07/2020, the first row will be 07/01/2020 and the last row will be 07/31/2020.	Y	Y	Y

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	When generated through the batch process, the WTW Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address

Mailing Options	Option for Form
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

7. Create an Employment Services Customer Reporting entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 125
Report Month	The report month.
Name	The customer name.
Type	CSF 125 **Technical Note:** The code num identifier use in C-IV is 'WSA' and is currently available in LRS/CalSAWS.
Provider	The provider associated to the activity.
Status	Employment Services Customer Reporting Status Employment Services Customer Reporting Statuses: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error For example: The status will be set to "Sent" if the form is generated and sent to the recipient through Batch.
Status Date	The date of the latest (and/or most) recent status.

8. Create a Journal entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 125
Case Id	The case Id of the current case.
Type	Document

Category	All
Short Description	CSF 125
Long Description	The CSF 125 was sent for the month of [Report Month (MM/YYYY)] for [Activity Type] – [Activity Number] at [Provider Name].
Created by	User or batch
Updated by	User or batch

2.4 Add the CSF 126 Form

2.4.1 Overview

Add the CSF 126 form to LRS/CalSAWS Template Repository.

Form: CSF 126 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.4.2 Description of Change

1. Create the CSF 126 form based of the WTW 753A form. The form will have a coversheet, with the BRM address on the second page. The form will have four impressions.

   Form Header: Please refer to **Section 3.0 Supporting Document #3**
   Form Footer: Please refer to **Section 3.0 Supporting Document #3**
   Form Title: Travel Assistance Claim
   Form Number: CSF 126
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #3**

2. Add the CSF 126 form to Template Repository.
   a. Create a new Document Parameters page with the following required parameters:

Figure 2.4.1 – Document Parameters Page

Document Parameter	Value
Case Number	The case number for the case which the user wants to generate the form for.
Report Month	The report month the user is generating for.
Customer Name	The dropdown contains the names of the persons.
Activities	The list of WTW activities link to the person selected in the Customer Name dropdown for the report month. The values will be in the following format: [Activity Type] [Start Date] – [End Date]. **Note:** Multiple activities can be selected when generating the CSF 126.
Program	The dropdown contains the list of programs.
Language	The dropdown contains the list of languages the form can be generated in.

b. Add 'Get Activities' button on the Document Parameters page. When clicked, the logic will populate the Activity dropdown based on the Case, Report Month, and Customer Name selected.

c. Add the following validations to the Document Parameters page.

   i. Display the following validation message when the 'Get Activities' button is clicked and either the Report Month is not filled in or the Customer Name is not selected:

'Customer Name and Report Month must be selected before retrieving activities.'

ii. Display the following validation message when the user attempts to generate the form for the same month, language, customer, and activity, when there is one already generated: '<FormNumber> has been sent for this Report Month, activity, and language. Please reprint if another is needed.' <FormNumber> is a variable that will be populated with the form number.
Note: If the worker generates the form for an existing activity, then a new activity is added and the worker tries to generate the form again for both activities, the validation will not display. If there are existing activities and the worker generates the form for some of the activities, then tries to generate the form again for all the activities, the validation will display.

d. This form will only be available to the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 126 – Page 1, Page 3	**County Name**	This field will be populated with the county name.	Y	Y
CSF 126 – Page 1, Page 3	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 126 – Page 1, Page 3	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 126 – Page 1, Page 3	**Case Name**	This field will be populated with the case name of the current case.	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 126 – Page 1, Page 3	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 126 – Page 1, Page 3	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y
CSF 126 – Page 1, Page 3	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y
CSF 126 – Page 1, Page 3	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y
CSF 126 – Page 1, Page 3	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 126 – Page 1, Page 3	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y
CSF 126 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y
CSF 126 – Page 3, Section 2	**Activity**	The field will be populated with the activity number. If there is no activity	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		number, it will be the activity type.		
CSF 126 – Page 3, Section 2	**Activity Site Name**	The field will be populated with the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 2	**Activity Site Address**	The field will be populated with the address of the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 2	**City**	The field will be populated with the city of the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 2	**Zip Code**	The field will be populated with the zip code of the provider associated with the activity.	Y	Y
CSF 126 – Page 3, Section 3	**Date**	Each row of the column will be populated with days of the report month. For example, if the report month is 07/2020, the first row will be 07/01/2020 and the last row will be 07/31/2020.	Y	Y

a. 'Section 2: Activity Information' will be a dynamic section. The section will initially accommodate four activities. When there are more than four activities, the section will repeat to accommodate the remaining activities. For example, if there are seven activities, the initial section will populate with four activities, the section will repeat, and populate the remaining three activities in the repeated section.

b. ‘Section 3: Activity Attendance’ will be a dynamic section. The section will initially accommodate four activities. When there are more than four activities, the section will repeat to accommodate the remaining activities. The section will also have rows for each day of the month. For example, if there are seven activities, the initial section will populate with four activities, the section will repeat, and populate the remaining three activities in the repeated section. If there are 31 days in a month, it will have 31 rows.

Note: If the number of activities selected is four or eight, Section 2 and Section 3 will repeat. Section 2 and Section 3 will repeat 3 times and will only accommodate 12 activities. For example, if the worker selects 14 activities, the form will only be populated with 12 activities. If the worker tries to generate the form again for the 2 activities that were not populated on the form, that worker will receive the validation.

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	When generated through Template Repository, the individual selected on the ‘Customer Name’ dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker’s Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

7. Create an Employment Services Customer Reporting entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 126
Report Month	The report month.
Name	The customer name.
Type	CSF 126 **Technical Note:** The code num identifier use in C-IV is 'WTA' and is currently available in LRS/CalSAWS.
Provider	The provider associated to the activity.
Status	Employment Services Customer Reporting Status Employment Services Customer Reporting Statuses: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error For example: The status will be set to "Sent" if the form is generated and sent to the recipient through Batch.
Status Date	The date of the latest (and/or most) recent status.

a. When the CSF 126 is generated from Template Repository, multiple activities can be selected for the report month. In that scenario, an Employment Services Customer Reporting entries will be created for each activity.

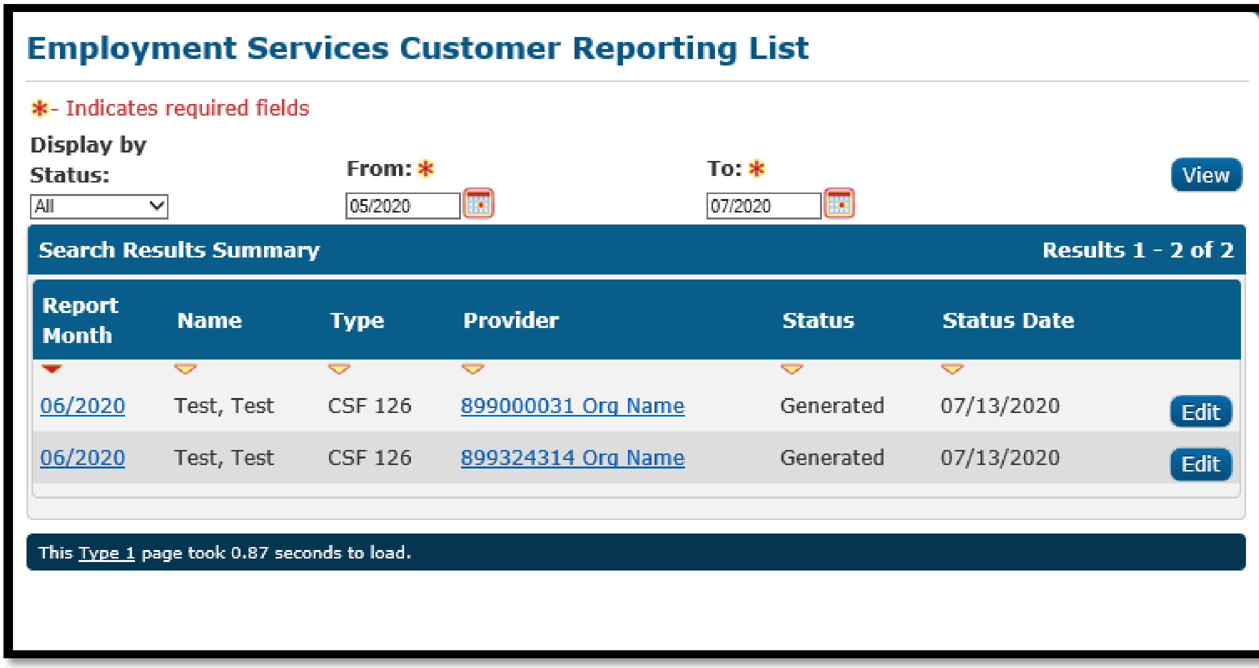


Figure 2.4.2 – Employment Services Customer Reporting List Page

8. Create a Journal entry when the form is generated and saved with the following information:

Field to Populate	Population for CSF 126
Case Id	The case Id of the current case.
Type	Document
Category	All
Short Description	CSF 126
Long Description	The CSF 126 was sent for the month of [Report Month (MM/YYYY)].
Created by	User
Updated by	User

2.5 Add the CSF 127 Form

2.5.1 Overview

Add the CSF 127 form to LRS/CalSAWS Template Repository.

Form: CSF 127 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English, Spanish

2.5.2 Description of Change

1. Create the CSF 127 form based off the 751.1 form. The form will have two impressions and have the BRM address on the second page.

   Form Header: Please refer to **Section 3.0 Supporting Document #4**
   Form Footer: Please refer to **Section 3.0 Supporting Document #4**
   Form Title: Return Travel Claim
   Form Number: CSF 127
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #4**

2. Add the CSF 127 form to Template Repository.
   a. The following parameters will be required:

      Required Form Input: Case Number, Customer Name, Program, Language

Figure 2.5.1 – Document Parameters Page

   b. This form will only be available for the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 127 – Page 1	**County Name**	This field will be populated with the county name.	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 127 – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 127 – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 127 – Page 1	**Case Name**	This field will be populated with the case name of the current case.	Y	Y
CSF 127 – Page 1	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 127 – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y
CSF 127 – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y
CSF 127 – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
		program. The phone number will have the following format: (###) ###-####		
CSF 127 – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 127 – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y
CSF 127 – Page 2	**Business Reply Mail**	This field will be populated with the BRM address.	Y	Y

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	Y	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	The individual selected on the 'Customer Name' dropdown on the Document Parameters page.

Mailing Options	Option for Form
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	BRM

2.6 Add the CSF 128 Form

2.6.1 Overview

Add the CSF 128 form to LRS/CalSAWS Template Repository.

Form: CSF 128 (11/20)

Programs: WTW

Attached Forms: N/A

Forms Category: Forms

Languages: English

2.6.2 Description of Change

1. Create the CSF 128 form based on the WEX 6 form. The form will have one impression.

   Form Header: Please refer to **Section 3.0 Supporting Document #5**
   Form Footer: Please refer to **Section 3.0 Supporting Document #5**
   Form Title: Subsidized WEX Time and Attendance Report
   Form Number: CSF 128
   Include NA Back 9: No
   Form Mockup/Example: Please refer to **Section 3.0 Supporting Document #5**

2. Add the CSF 128 form to Template Repository.
   a. The following parameters will be required:

      Required Form Input: Case Number, Customer Name, Program, Language

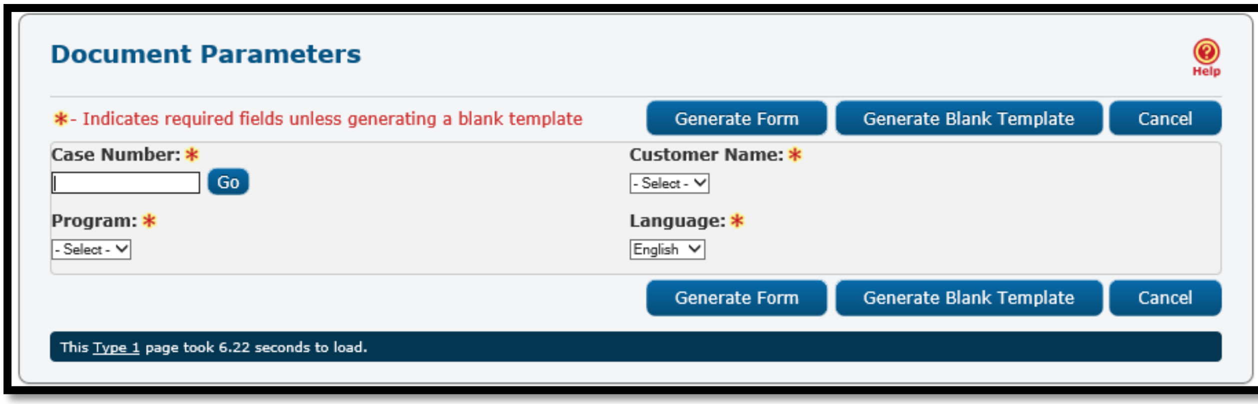


Figure 2.6.1 – Document Parameters Page

b. This form will only be available for the 57 Migration Counties.

3. Add the following population logic:

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 128 – Page 1	**County Name**	This field will be populated with the county name.	Y	Y
CSF 128 – Page 1	**Office Address**	This field will be populated with the office address of the worker assigned to the program.	Y	Y
CSF 128 – Page 1	**Date**	This field will be populated with the date when the form was generated. It will have the following format: MM/DD/YYYY	Y	Y
CSF 128 – Page 1	**Case Name**	This field will be populated with the case name of the current case.	Y	Y

Section	Field	Population	Populates from Template Repository	Editable from Template Repository
CSF 128 – Page 1	**Case Number**	This field will be populated with the case number of the current case.	Y	Y
CSF 128 – Page 1	**Worker Name**	This field will be populated with the name of the worker assigned to the program.	Y	Y
CSF 128 – Page 1	**Worker ID**	This field will be populated with the Id of the worker assigned to the program.	Y	Y
CSF 128 – Page 1	**Worker Phone Number**	This field will be populated with phone number of the worker assigned to the program. The phone number will have the following format: (###) ###-####	Y	Y
CSF 128 – Page 1	**Customer Id**	This field will be populated with the primary applicant's customer Id.	Y	Y
CSF 128 – Page 1	**Recipient Mailing Address**	This field will be populated with the mailing address of the recipient.	Y	Y

4. Add the following barcode options:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

5. Add the following print options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

6. The form will have the following mailing options:

Mailing Options	Option for Form
Mail-To (Recipient)	The individual selected on the 'Case Name' dropdown on the Document Parameters page.
Mailed From (Return)	WTW Worker's Office/District Office Address
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard Mail Envelope
Return Envelope Type	N/A

2.7 Migrate the WTW 733.4 Batch Job

2.7.1 Overview

The C-IV WTW 733.4 batch job (JB00R545) is a daily batch job responsible for finding WTW participants that have ongoing Work Participation Rate (WPR) Community Service activities that need to be sent a WTW 733.4. Migrate the batch job and modify it to send out the new CSF 124 form.

2.7.2 Description of Change

1. Migrate the C-IV WTW 733.4 batch job. The batch job will be modified to send the CSF 124 form. The driving query will find cases that have a WTW program in any status such as Active or Good Cause, where the primary applicant has an ongoing 'Community Service' activity for the report month (the batch month falls within the begin and end date for the activity). If the WTW primary applicant has multiple Community Services activities for the report month, the CSF 124 form will generate for each one. If the activity spans multiple months, the form will generate for each report month. For example, if there is an activity spans July and August, when the batch runs in July, it will generate a

CSF 124. When the batch runs again in August, it will generate another one.

2. If there is a CSF 124 already generated for the same person, activity, report month and language, the driving query will not insert a record in the system transaction table.

3. Since this is a daily batch, if the batch date is within 10 calendar days of the following month, the CSF 124 form will also be generated for the following report month, if the activity is still ongoing for that month. For example, when the batch runs after 10 day in July and picks up a new activity that spans July and August, the batch job will pick up the case and generate the CSF 124 for both the July and August report months. When the batch runs after 10 day in July and picks a new activity that ends in July, the batch job will pick up the case and generate the CSF 124 for only the July report month.

4. For each record returned from the driving query, insert a record into the system transaction and system transaction detail tables.
    a. Insert the following transactional values in the system transaction table:

Column to Populate	Population for CSF 124
Case Id	The Id of the case associated to the WTW program.
Program Id	The Id of the active WTW program.
Person Id	The primary applicant of the WTW program.
Type Code	FR
Sub Type Code	The current sub type code used in C-IV is 'WPA' and it currently available in LRS/CalSAWS. However, if the WPA sub type code is not available at the time of implementation, the logic will need to be updated to support a new sub type code.
Effective Date	The report month.

    b. Insert the following transactional values in the system transaction detail table:

Column to Populate	Population for CSF 124
Column Name	CUST_ACTIV_ID
Column Value	The Id of the activity returned by the driving query.

2.7.3 Execution Frequency

This batch job will run daily.

2.7.4 Key Scheduling Dependencies

This job will run before the Forms Balancer job.

2.7.5 Counties Impacted

This job will run for the following counties: Alpine (02), Colusa (06), Del Norte (08), Inyo (14), Kings (16), Lassen (18), Mariposa (22), Mono (26), Nevada (29), Plumas (32), San Bernardino (36), Sierra (46), Siskiyou (47), Sutter (51), Tuolumne (55), and Yuba (58).

Note: The list of counties above are the current counties opted into the process in C-IV.

2.7.6 Data Volume/Performance

Approximately 1,600 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary.

2.7.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.8 Migrate the WTW 735.2 Batch Job

2.8.1 Overview

The C-IV WTW 735.2 batch job (JB00R546) is a daily batch job responsible for finding WTW participants that have one of the following ongoing WPR activities: Education – Empl, Job Skills Training – Empl, and Voc/Ed Training that needs to be sent a WTW 735.2. Migrate the batch job and modify it to send out the new CSF 125 form.

2.8.2 Description of Change

1. Migrate the C-IV WTW 735.2 batch job. The batch job will be modified to send the CSF 125 form. The driving query will find cases that have a WTW program in any status such as Active or Good Cause, where the primary applicant has one of the following ongoing WPR activities: Education – Empl, Job Skills Training – Empl, and Voc/Ed Training for the report month (the batch month falls within the begin and end date for

the activity). If the WTW primary applicant has multiple activities for the report month, the CSF 125 form will generate for each one.

2. If there is a CSF 125 already generated for the same person, activity, report month and language, the driving query will not insert a record in the system transaction table.

3. Since this is a daily batch, if the batch date is within 10 calendar days of the following month, the CSF 125 form will also be generated for the following report month, if the activity is still ongoing for that month.

4. For each record returned from the driving query, insert a record into the system transaction and system transaction detail tables.
    a. Insert the following transactional values in the system transaction table:

Column to Populate	Population for CSF 125
Case Id	The Id of the case associated to the WTW program.
Program Id	The Id of the active WTW program.
Person Id	The primary applicant of the WTW program.
Type Code	FR
Sub Type Code	The current sub type code used in C-IV is 'WSA' and is currently available in LRS/CalSAWS. However, if the WSA sub type code is not available at the time of implementation, the logic will need to be updated to support a new sub type code.
Effective Date	The report month.

    b. Insert the following transactional values in the system transaction detail table:

Column to Populate	Population for CSF 125
Column Name	CUST_ACTIV_ID
Column Value	The Id of the activity returned by the driving query.

2.8.3 Execution Frequency

This batch job will run daily.

2.8.4 Key Scheduling Dependencies

This job will run before the Forms Balancer job.

2.8.5 Counties Impacted

The job will run for the following counties: Alpine (02), Colusa (06), Del Norte (08), Inyo (14), Kings (16), Lassen (18), Mariposa (22), Mono (26), Nevada (29), Plumas (32), San Bernardino (36), Sierra (46), Siskiyou (47), Sutter (51), Tuolumne (55), and Yuba (58).

Note: The list of counties above are the current counties opted into the process in C-IV.

2.8.6 Data Volume/Performance

Approximately 5,900 records are processed monthly in C-IV. Please note that this is an approximation and this number may vary.

2.8.7 Failure Procedure/Operational Instructions

Batch Support/Operations staff will diagnose the nature of the failure and determine the appropriate action.

2.9 Employment Services Customer Reporting List

2.9.1 Overview

Migrate the 'Employment Services Customer Reporting List' page from C-IV to LRS/CalSAWS. This page will be available under Employment Services-Global Navigation, Reporting-Local Navigation, and Customer Reporting-Task Navigation.

2.9.2 Reporting-Local Navigation Mockup

Figure 2.9.2-1 – Reporting-Local Navigation

2.9.3 Customer Reporting-Task Navigation Mockup

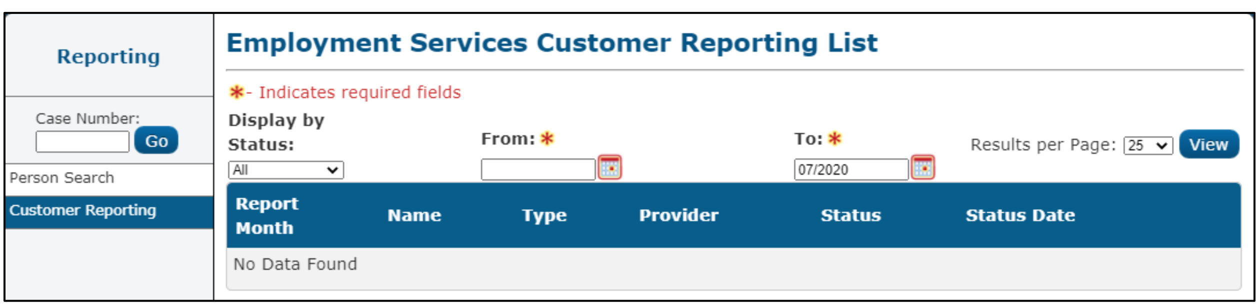


Figure 2.9.3-1 – Customer Reporting-Task Navigation

2.9.4 Employment Services Customer Reporting List Mockup

Figure 2.9.4-1 – Employment Services Customer Reporting List Page

2.9.5 Description of Change

1. Create/Migrate a new page 'Employment Services Customer Reporting List' page in LRS/CalSAWS from C-IV.
2. The list of Forms that can be displayed on the page are as follows:
    i. CSF 124
    ii. CSF 125
    iii. CSF 126
3. This new page will be accessed within the context of a case in Employment Services-Global Navigation, Reporting-Local Navigation and Customer Reporting-Task Navigation.
4. Add 'Reporting' in the Employment Services-Local Navigation below 'Case Summary'.
5. Add 'Customer Reporting' and 'Person Search' in the Reporting-Task Navigation. Note: If a user is not in the context of a case, 'Customer Reporting' option under Task navigation will not be displayed, only 'Person Search' will be displayed.
6. Default sort of this page will be by Report Month in descending order. See field level description of Employment Services Customer Reporting List page.

Field Name	Description	Required
Display by Status	This field displays the status of the report. This field will be defaulted to	No

	'All' when user first navigates to the page. Field dropdown values will be as follows: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error	
Date Range – From	This field displays the date range user selects formatted as mm/yyyy. Note: As a default, From field will be set to 2 months prior to the current month. When accessed from 'Monthly Productivity List' page via a hyperlink, From field will be set to the selected month.	Yes Validate when clicking on View button.
Date Range – To	This field displays the date range user selects formatted as mm/yyyy. Note: As a default, this field will be set to the current month.	Yes Validate when clicking on View button.
View – Button	When clicking this button, Search Results Summary section will display the results.	No
Report Month	This column displays the report month when the form is last updated. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the Employment Services	

	Customer Reporting Detail page.	
Name	This column displays the name of the person formatted as <Last Name>, <First Name> <Age><Gender Initial>. This is a text field.	
Type	This field displays the Form number.	
Provider	This field displays the name of the provider printed on the form. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the existing Resource Detail page for the Provider.	
Status	This field displays the status of the form.	
Status Date	This field displays the date when the Report status was last updated formatted as mm//dd/yyyy.	
Edit-Button	When clicking on this button, user will be navigated to the Employment Services Customer Reporting Detail page in Edit mode.	

2.9.6 Page Location

- **Global:** Employment Services
- **Local:** Reporting
- **Task:** Customer Reporting

2.9.7 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer Reporting List Page.	Employment Services Reporting View
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer Reporting List Page.	Employment Services Reporting Edit
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer Reporting List Page.	Employment Services Monthly Productivity View
EmploymentServicesReportingListView;	This right allows the user to access and view the Employment Services Customer	Employment Services Monthly Productivity Edit

Security Right	Right Description	Right to Group Mapping
	Reporting List Page.	

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Employment Services Reporting View	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix
Employment Services Reporting Edit	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix Document
Employment Services Monthly Productivity View	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix Document
Employment Services Monthly Productivity Edit	This group allows the user to access the Employment Services Customer Reporting List Page.	See attached Security Matrix

2.9.8 Page Mapping

PMCR for the fields on the new page.

2.9.9 Page Usage/Data Volume Impacts

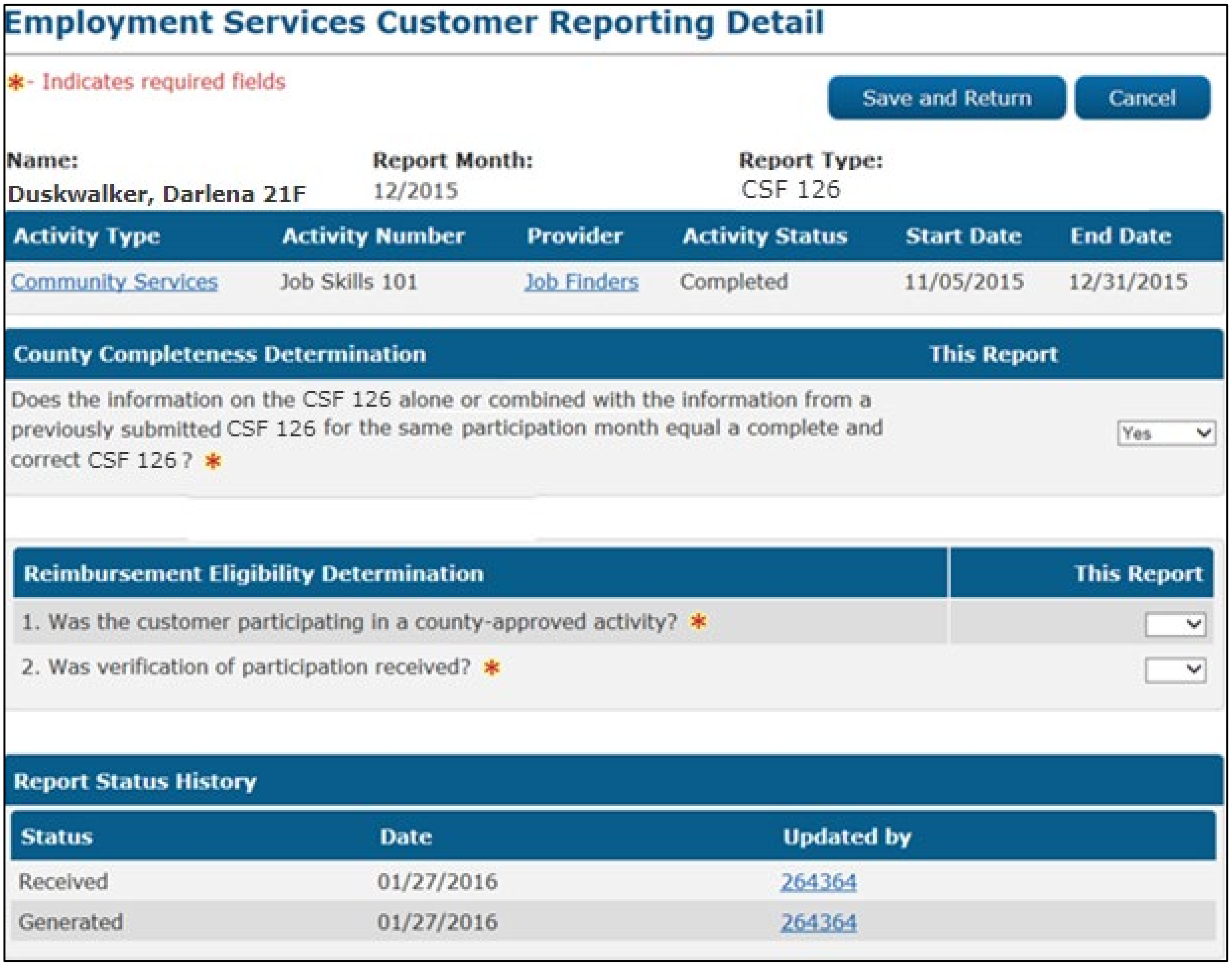
N/A

2.10 Employment Services Customer Reporting Detail

2.10.1 Overview

Migrate the Employment Services Customer Reporting Detail page from C-IV to LRS/CalSAWS. This page will be accessed from the Report Month hyperlink on the Employment Services Customer Reporting List page.

2.10.2 Employment Services Customer Reporting Detail Mockup



Employment Services Customer Reporting Detail

*- Indicates required fields

Save and Return | Cancel

Name: Duskwalker, Darlena 21F | **Report Month:** 12/2015 | **Report Type:** CSF 126

Activity Type	Activity Number	Provider	Activity Status	Start Date	End Date
Community Services	Job Skills 101	Job Finders	Completed	11/05/2015	12/31/2015

County Completeness Determination	This Report
Does the information on the CSF 126 alone or combined with the information from a previously submitted CSF 126 for the same participation month equal a complete and correct CSF 126 ? *	Yes

Reimbursement Eligibility Determination	This Report
1. Was the customer participating in a county-approved activity? *	
2. Was verification of participation received? *	

Report Status History

Status	Date	Updated by
Received	01/27/2016	264364
Generated	01/27/2016	264364

Figure 2.10.2-1 – Employment Services Customer Reporting Detail Page

2.10.3 Description of Change

1. Create/Migrate a new page 'Employment Services Customer Reporting Detail' page in LRS/CalSAWS from C-IV.
2. The list of Forms that can be displayed on the page are as follows:
   i. CSF 124
   ii. CSF 125
   iii. CSF 126

3. This new page will be accessed from the Report Month hyperlink on the Employment Services Customer Reporting List page.
4. The ‘Activity Type’ hyperlink on Employment Services Customer Reporting Detail page will navigate the user to the existing Activity Detail page.
5. The ‘Provider’ hyperlink on Employment Services Customer Reporting Detail page will navigate the user to the existing Provider Detail page.
6. The ‘Updated by’ hyperlink on Employment Services Customer Reporting Detail page will navigate the user to the Worker Detail page.
7. A question will be displayed in ‘County Completeness Determination’ section of the Employment Services Customer Reporting Detail page; ‘Does the information on the <FormName> alone or combined with the information from a previously submitted <FormName> for the same participation month equal a complete and correct <FormName>’ with a select option in front of it.
    a. When a CSF 126 ‘County Completeness Determination’ question is marked ‘Yes’ in ‘This Report’ dropdown field, the Reimbursement Eligibility Determination questions will be displayed.
        i. ‘Was the customer participating in a county-approved activity?’. This question will have the values ‘Yes’ and ‘No’ in ‘This Report’ dropdown field.
        ii. ‘Was verification of participation received?’ This question will have the values ‘Yes’ and ‘No’ in ‘This Report’ dropdown field.
    b. When a CSF 126 Completeness Determination question is marked ‘No’, a CSF 127 **Return Travel Claim** form will pop up for the worker to complete upon clicking the ‘Save and Return’ button.
8. If ‘N/A’ is selected in ‘This Report’ dropdown field, it will indicate that the report is voided. A worker will be able to create a new form manually.
9. Add a validation when clicking Save and Return to not allow the user to change the status of the report if another form is printed for the month, unless the status other form is marked N/A.
   “Cannot change this report because another valid report exists for the month.”
10. Clicking on ‘Cancel’ cannot change the report because another valid report exists for the month.

    Based on the answers selected in ‘County Completeness Determination’ section and ‘Reimbursement Eligibility Determination section’ and upon clicking the ‘Save and Return’ button, the new status of the report will be displayed in the ‘Status’ field of ‘Report Status History’ section of the page. The new status will be determined as follows:

Condition	New Status
County Completeness Determination question = 'N/A'	Not Applicable
County Completeness Determination question = 'No'	Incomplete
County Completeness Determination question = 'Yes' All Reimbursement Eligibility question = 'Yes'	Complete
County Completeness Determination question = 'Yes' All Reimbursement Eligibility question = 'No'	Denied

The status will also be changed as the result of the following external events.

Event	New Status
Report is generated	Generated
Report is generated through batch or Save/Print Central from Template Repository and mailed by the batch central print process	Sent
The barcode is scanned	Received
Central Print Fails	Error

See field level description of the Employment Services Customer Reporting Detail page.

Field Name	Description	Required
Name	This field will display the name of the person formatted as<Last Name>, <First Name> <Age><Gender Initial>. This is a text field.	No
Report Month	This field will display the report month. This is a text field.	No
Report Type	This field will display the title of the form. This is a text field.	No
Activity Type	This field will display the title of the activity. Description provided above.	No

Activity Number	This field will display the number of the activity. This is a text field.	No
Provider	This field will display the name of the provider. Description provided above.	No
Activity Status	This field will display the status of the activity. This is a text field.	No
Start Date	This field will display the start date of the activity. This is a text field.	No
End Date	This field will display the end date of the activity. This is a text field.	No
County Completeness Determination	This section will display the determination question. Note: Description provided above.	Yes Validate when clicking on Save and Return button.
This Report-County Completeness Determination	This dropdown will display following values in this order: • Yes • No • N/A As a default, this field will display '-Select-'.	Yes Validate when clicking on Save and Return button.
This Report-Reimbursement Eligibility Determination	This dropdown will display following values in this order: • Yes • No As a default, this field will be '-Select-'.	Yes Validate when clicking on Save and Return button.
Reimbursement Eligibility Determination	This field will display the questions based upon the selection in County	Yes Validate when clicking on Save

	Completeness Determination question. Note: Description provided above.	and Return button.
Status	This field will display the updated status of the Report. Values for this field include: • Generated • Sent • Received • Not Applicable • Incomplete • Denied • Completed • Error	No
Date	This field will display the date when the report is last updated formatted as mm/dd/yyyy. This is a text field.	No
Updated by	This field will display the staff id. Description provided above.	No

2.10.4 Page Location

- **Global:** Employment Services
- **Local:** Reporting
- **Task:** Customer Reporting

2.10.5 Security Updates

1. Security Rights

Security Rights	Right Description	Right to Group Mapping
EmploymentServicesReportingDetailView;	This right allows the user to access and view the Employment	Employment Services Reporting View

	Services Customer Reporting Detail Page.	
EmploymentServicesReportingDetailView; EmploymentServicesReportingDetailEdit;	This right allows the user to view and edit the Employment Services Customer Reporting Detail Page.	Employment Services Reporting Edit
EmploymentServicesReportingDetailView;	This right allows the user to view the Employment Services Customer Reporting Detail Page.	Employment Services Monthly Productivity View
EmploymentServicesReportingDetailView; EmploymentServicesReportingDetailEdit;	This right allows the user to view the Employment Services Customer Reporting Detail Page.	Employment Services Monthly Productivity Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Employment Services Reporting View	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document

Security Group	Group Description	Group to Role Mapping
Employment Services Reporting Edit	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document
Employment Services Monthly Productivity View	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document
Employment Services Monthly Productivity Edit	This page allows the user to access the Employment Services Customer Reporting Detail Page.	See attached Security Matrix Document

2.10.6 Page Mapping

PMCR for the fields on the new page.

2.10.7 Page Usage/Data Volume Impacts

N/A

2.11 Employment Services Monthly Productivity List

2.11.1 Overview

Migrate the Employment Services Monthly Productivity List page from C-IV to LRS/CalSAWS. This page will be accessed from the Employment Services-Global Navigation, Workload Inventory-Local Navigation and Monthly Productivity-Task Navigation.

2.11.2 Monthly Productivity-Task Navigation Mockup

Figure 2.11.2-1 – Monthly Productivity-Task Navigation

2.11.3 Employment Services Monthly Productivity Mockup

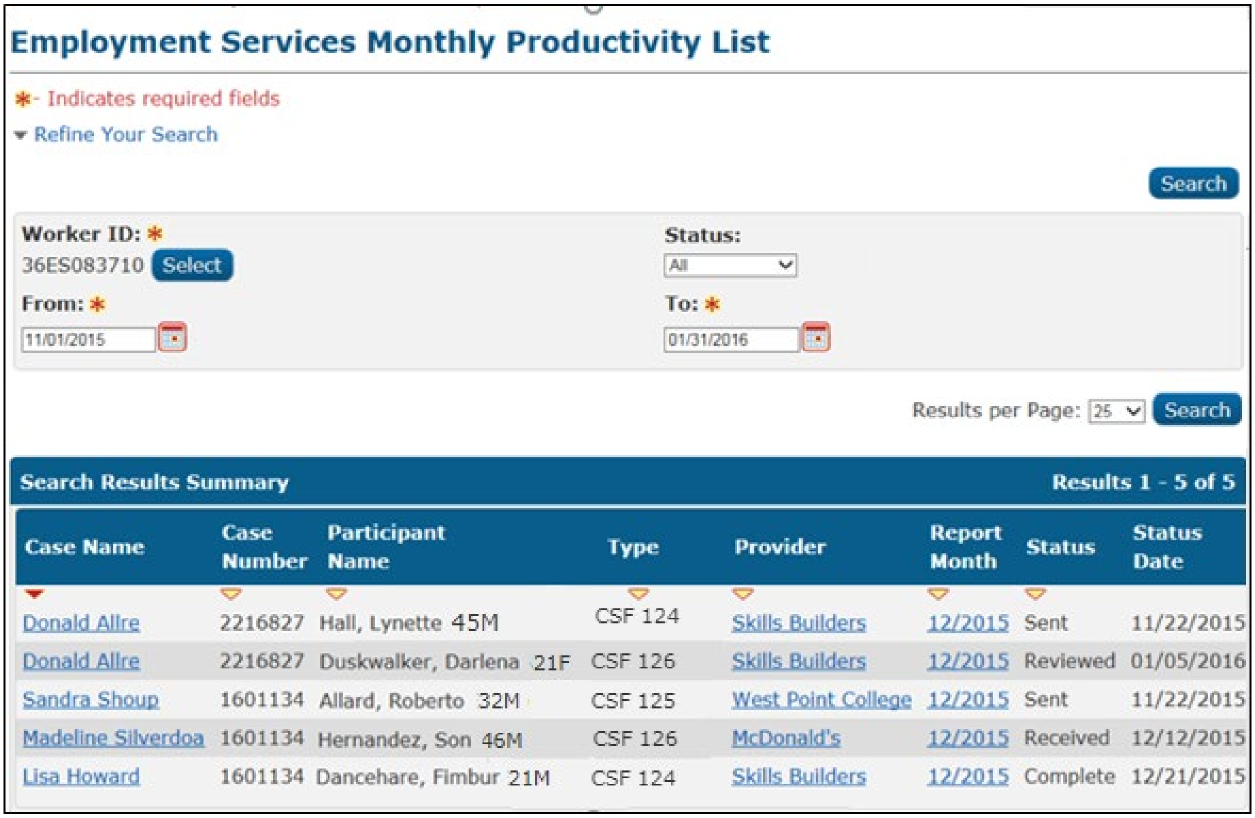


Figure 2.11.3-1 – Employment Services Monthly Productivity List page

2.11.4 Description of Change

1. Create/Migrate a new page 'Employment Services Monthly Productivity List' page in LRS/CalSAWS from C-IV.
2. The list of the Forms that can be displayed on the page are as follows:
   i. CSF 124
   ii. CSF 125
   iii. CSF 126
3. This new page will be accessed under Employment Services-Global Navigation, Workload Inventory-Local Navigation and Monthly Productivity-Task Navigation.
4. Add 'Monthly Productivity' option in the Workload Inventory-Task Navigation below Job Development Detail.
5. This page will display the records of cases assigned to the selected worker which have status dates falling within the specified date range and with the status matching the selection.

   See field level description of the Employment Services Monthly Productivity List page.

Field Name	Description	Required

Worker ID	This is a select field. This field navigates the user to the Select Worker page for selecting the worker.	Yes Validate when clicking on Search button.
Status	This field narrows down the search to the records with the matching statuses. This field will be defaulted to 'All'.	No
Date Range-From	When accessed from the Task Navigation bar, this field will be set to 2 months prior to the current month. When accessed from the Monthly Productivity List via a hyperlink, the field will be set to the selected month.	Yes Validate when clicking on Search button.
Date Range-To	This field will be defaulted to the current month.	Yes Validate when clicking on Search button.
Case Name	This column will display the name of the person in the case. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the Case Summary page.	
Case Number	This column will display the Person's case number. This is a text field.	
Participant Name	This column will display the name of the person participating in the activity formatted as <Last Name>, <First Name> <Age><Gender Initial>. This is a text field.	
Type	This column will display the title of the report. This is a text field.	
Provider	This column will display the name of the provider. The value in this field will be hyperlinked. Upon clicking on the link the user will be navigated to the existing Resource Detail page for the Provider.	
Report Month	This column will display the Reporting month. The value in this field will be hyperlinked. Upon	

	clicking on the link the user will be navigated to the Employment Services Customer Reporting List page.	
Status	This column will display the status of the report. This is a text field.	
Status Date	This column will display the date of the status last updated. This is a text field.	

2.11.5 Page Location

- **Global:** Employment Services
- **Local:** Workload Inventory
- **Task:** Monthly Productivity

2.11.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
EmploymentServicesMonthlyProductivityListView	This right allows user to access Employment Services Monthly Productivity List Page.	Employment Services Monthly Productivity View
EmploymentServicesMonthlyProductivityListView	This right allows user to access Employment Services Monthly Productivity List Page.	Employment Services Monthly Productivity Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Employment Services Monthly Productivity View	This right allows user to access Employment Services Monthly Productivity List Page	See attached Security Matrix
Employment Services Monthly Productivity Edit	This right allows user to access Employment Services Monthly Productivity List Page	See attached Security Matrix

2.11.7 Page Mapping

PMCR for the fields on the new page.

2.11.8 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	CSF 124 Mockup	CSF124_EN.pdf CSF124_SP.pdf
2	Client Correspondence	CSF 125 Mockup	CSF125_EN.pdf CSF125_SP.pdf
3	Client Correspondence	CSF 126 Mockup	CSF126_EN.pdf CSF126_SP.pdf
4	Client Correspondence	CSF 127 Mockup	CSF127_EN.pdf CSF127_SP.pdf
5	Client Correspondence	CSF 128 Mockup	CSF128_EN.pdf
6	Client Correspondence	CSF126 Dynamic Section Example	CSF126 Dynamic Section Example.pdf
7	Security	Security Matrix	CA-201968 Security Matrix.xlsx

4 REQUIREMENTS

4.1 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.	The existing forms, pages, and batch processes used in tracking WTW activities were migrated from C-IV to LRS/CalSAWS.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207108 | DDID 2302

Updates to Standardized Barcodes

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Lawrence Samy
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/3/2019	1.0	Initial revision	Lawrence Samy
08/19/2020	1.1	Content Revision – Added Recommendation, its details in a new section, and updated Assumptions	Jasmine Chen

Table of Contents

1 OVERVIEW

A standardized barcode will be used to track and image documents in CalSAWS.

1.1 Current Design

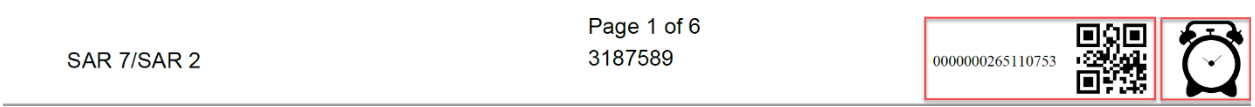
LRS:

A one dimensional (1D) tracking barcode and two dimensional (2D) imaging barcode are used on the LRS forms and Notice of Actions (NOAs). Both barcodes contain the same barcode value. The imaging barcode is used to retrieve case information when a document is imaged using Electronic Data Management System (EDMS), while the tracking barcode is used to retrieve case information and mark a document as received via document/barcode scanner or Barcode Routing Detail page.

LRS Form Example

C-IV:

Both tracking and imaging barcode have been combined into a single two dimensional (2D) barcode which displays on the bottom right side of C-IV System forms and NOAs. A clock icon is displayed next to the barcode to indicate if it is a tracked document through customer reporting and needs to be returned timely.



C-IV Form Example

1.2 Requests

A standardized barcode to retrieve all pertinent information necessary to identify the document, customer, and case will be added to applicable documents before printing.

1.3 Overview of Recommendations

1. Migrate the C-IV single Imaging/Tracking barcode along with the clock icon to CalSAWS for the 57 counties.
2. Los Angeles County will retain the existing separate imaging and tracking barcodes until migration to the CalSAWS imaging solution.
3. Update impacted files and logic to evaluate county code so that the appropriate barcode is added to applicable documents before printing.

1.4 Assumptions

1. No other system changes will be required to receive the document into the system since the current imaging and tracking barcode contain the same barcode value.
2. The types of barcodes currently assigned to each form will not be changed with this SCR. For example, forms that include both a tracking and imaging barcode for Los Angeles County will include the migrated tracking (clock icon) and imaging barcodes when generated for the Migration counties.
3. Documents which are not tracked will not display the clock icon. No changes will be made to which documents are being tracked. Supporting Document 1 'DDID 2302 CalSAWS Imaging Barcode_Clock Icon Forms' is provided as a reference for testing purposes. This is not a comprehensive list of all forms with barcodes.
4. As part of the CalSAWS imaging solution effort, all documents will be reviewed to be evaluated if it requires an imaging barcode.
5. With CA-214197 in release 20.11, search results in the Template Repository will display documents based on the county of the logged-in user.
6. With future SCR CA-217626, 2D imaging barcodes will be added to all applicable forms.

2 RECOMMENDATIONS

2.1 Standard Barcode

2.1.1 Overview

Converting to a 2D barcode as the standard barcode maximizes page space and increases scanning accuracy by adding redundant sectors.

2.1.2 Description of Change

1. Migrate the C-IV single Imaging/Tracking barcode along with the clock icon to CalSAWS as the standard barcode for the 57 counties.
2. Similar to C-IV, the standard barcode will be used to retrieve document, customer, and other case information when imaging CalSAWS documents into the CalSAWS imaging solution.
3. The standard barcode will also be used to retrieve required case information when scanning CalSAWS documents to mark them as received.
4. The standard barcode will appear on every page of the document on ~~the same location as C-IV (bottom right).~~ the bottom right as shown below:

5. The barcode value stored in the standard barcode will be unique per document such that no two documents will contain the same barcode value.
6. All document barcode values will be saved in the DOC_BARCODE_IDENTIF column of the GENERATE_DOC table.
7. Los Angeles County will retain the existing barcodes until migration to the CalSAWS imaging solution.
8. Update Batch logic to be able to generate documents with an imaging barcode that are not tracked.

2.2 Update Impacted Files to evaluate County Code

2.2.1 Overview

Considering Los Angeles County will retain their existing 2 separate barcodes until migration to the new CalSAWS imaging solution, the CalSAWS system will need to recognize if a document is generated from Los Angeles County or from one of the 57 Migration counties.

Impacted files and logic will need to be updated to provide a county code so that the appropriate barcode is added to documents before printing.

2.2.2 Description of Change

1. Update the impacted files and logic mentioned in Supporting Document 2 'CA-207108 - Impact Analysis_CR.xlsx' to provide a county code for the CalSAWS system to determine printing a document with either 2 barcodes (if county code is Los Angeles) or the 1 standard barcode (if county code is one of the 57 Migration counties).

3 SUPPORTING DOCUMENTS

Document Number	Description	Documents
1	~~List of Forms with Clock Icon~~ Updated list of CalSAWS form templates with Imaging Barcode and/or Clock Icon.	DDID 2302 CalSAWS Imaging Barcode_Clock Icon Forms.xlsx
2	List of impacted files from latest Impact Analysis.	CA-207108 - Impact Analysis_CR.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2302	The CONTRACTOR shall design a standardized set of barcodes to encode all information necessary to identify the form, customer, and case and shall configure the system to add those barcodes to all forms before they are sent to printing.	• 2D barcode currently in C-IV will be used as the standard barcode • Data elements to be included will be decided upon at design	C-IV Imaging/Tracking barcodes are migrated to CalSAWS for the 57 Migration Counties.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207252 | DDID 1778

Updates to LRS Lobby Check-in App, Kiosk and FACT functionality

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
5/01/2020	1.0	Original Document	Melissa Mendoza
7/13/2020	2.0	Updated section 2.2 with changes to the Case Number Screen	Erika Kusnadi-Cerezo
7/27/2020	3.0	Updated design document for Del 37 comment (include grammar, expanding acronyms and updated Reception Log mockup).	Erika Kusnadi-Cerezo
9/4/2020	4.0	Added 2 more assumptions, Updated Figure 2.2.1d, added to section 2.1.3 #9 the information that will be provided to ISD and Added to section 2.3.3.3b about the Remote Kiosk Configuration security group	Erika Kusnadi-Cerezo, Melissa Mendoza
9/22/2020	5.0	Added more specific to LA number generation	Erika Kusnadi-Cerezo.

Table of Contents

1 OVERVIEW

The request for DDID 1778 includes expanding the LRS Lobby iOS Solution to support all 58 counties as well as migrate the Kiosk and Facilitated Access Control Tablet (FACT) applications from C-IV to LRS/CalSAWS and enable them to support all 58 counties.

1.1 Current Design

The LRS iOS Lobby Solutions were designed to work specifically for Los Angeles County. There are two lobby solutions, one that the Workers use to help assist customers in the lobby referred to as the Los Angeles County Lobby Check-in Application, and another that is a Self-Service application for the Customer to use in the lobby. They are both integrated into the Your Benefits Now (YBN) Application and have Los Angeles County specific graphics and logos.

The C-IV Kiosk and FACT are used in C-IV County office lobbies today to support the C-IV counties. The Kiosk was designed with a generic look and feel for the Customers in the lobby to use to check in and complete tasks like scanning documents. The FACT is a tablet that the Workers in the lobby use to assist Customers including checking them in for appointments.

1.2 Requests

Per DDID 1778, expand the Los Angeles County's iOS Lobby Check-in solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.

1.3 Overview of Recommendations

1. Update the LRS Lobby Check-in Application's look and feel to support all 58 counties.
2. Update the LRS Lobby Check-in Application with new webservices that will integrate into the LRS/CalSAWS system instead of YBN.
3. Migrate the C-IV lobby services and code from the C-IV system to the LRS/CalSAWS.
4. Update the FACT (FACT 1.0 and FACT 2.0) with the CalSAWS system name.

1.4 Assumptions

1. The YBN web service that supports the iOS apps will be rearchitected to work independent of the self-service portal with CalSAWS directly. Dependencies on the self-service portal and modifications to it to support the iOS apps will be part of the new self-service portal.
2. The Printing devices and Scanning devices will not change for any application.
3. Estimate includes current features in LRS iOS and C-IV Lobby/FACT applications, no additional features.
4. Transferring data is not part of this estimate as the Statewide Self-Service Portal is not within the scope of CalSAWS migration.

5. This estimate does not include the External Mobile App as the Statewide Self-Service Portal is not within the scope of CalSAWS migration.
6. The Los Angeles County's iOS solutions will require modifications and access to the C4Yourself and Benefits CalWIN Self Service Portal in order to work for the remaining 57 counties. Since the Self- Service Portal modifications are not to be included within the scope of this CalSAWS Migration DD&I Project these changes will not be estimated or accounted for. Once the CONSORTIUM identifies the approach and requirements for the Self-Service portal, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for approval through the County Change Control Board process.
7. The iOS Lobby Check-in Solutions in this estimate will only be supported for Los Angeles County until the Self-Service Portal has been addressed.
8. The purchase of any new iOS device, Kiosks, or FACTs is not accounted for.
9. Additional counties electing to use the supported iOS, Kiosk, or FACT devices that currently do not utilize these devices is not accounted for.
10. Test equipment for iOS devices will continue to be provided by Los Angeles County as they are currently provided today in LRS.
11. This estimate does not account for onsite support for updates to the iOS and Kiosk systems. Support will continue to be provided how it is currently provided in the LRS and C-IV systems.
12. The LRS Self-Service Check-in iOS Application, since it is dependent on the Self-Service State-wide portal, will be updated when the Self-Service solution is completed (CA-217869).
13. The San Fernando Valley Lobby Check-in Application will not be updated as part of this effort. Any changes needed to the San Fernando Valley Lobby Check-In Application will need to be done by the Los Angeles ISD (Internal Services Department) team.
14. The C-IV Kiosk and FACT applications will retain the same functionality when moving from C-IV to LRS even if not stated in this document.
15. The following DDIDs/SCRs are needed for the Kiosk and FACT Functionality including scanning images, scanning barcodes and texting and will be implemented in a later release:
    - Tracked barcoded documents with the clock icon is part of CA-207108 (DDID 2302).
    - Scanning documents into the Kiosk with corresponding text campaign will send a text message is part of CA-207106 (DDID 2305)
    - Uploading documents from the Kiosk into Imaging is part of CA-214026 (DDID 2192).
16. The LRS Lobby Check-in Application will only support images uploaded to EDMS (Enterprise Document Management System) imaging solution until CA-214026 (DDID 2192) is implemented.
17. The Los Angeles County Lobby Check-In applications will retain existing functionality unless mentioned in the Description of Changes of this SCR.
18. Functionality related to Tasks will be address under a separate SCR. (There will be multiple efforts to address this and they can be track under one of the following DDID's: DDID 1955, DDID 1628, DDID 162).

2 RECOMMENDATIONS

Update the Los Angeles County Lobby Check-in Application to support all 58 counties. Migrate the Kiosk and FACT code to the LRS/CalSAWS to support all 58 counties. Update the look and feel for the solutions to no longer be county specific and to use the new CalSAWS system name.

2.1 Los Angeles County Lobby Check-in Application

2.1.1 Overview

Configure the Los Angeles County Lobby Check-in Application to be accessible for counties outside of Los Angeles to use to check in their customers.

2.1.2 Los Angeles County Lobby Check-in Application Mockup

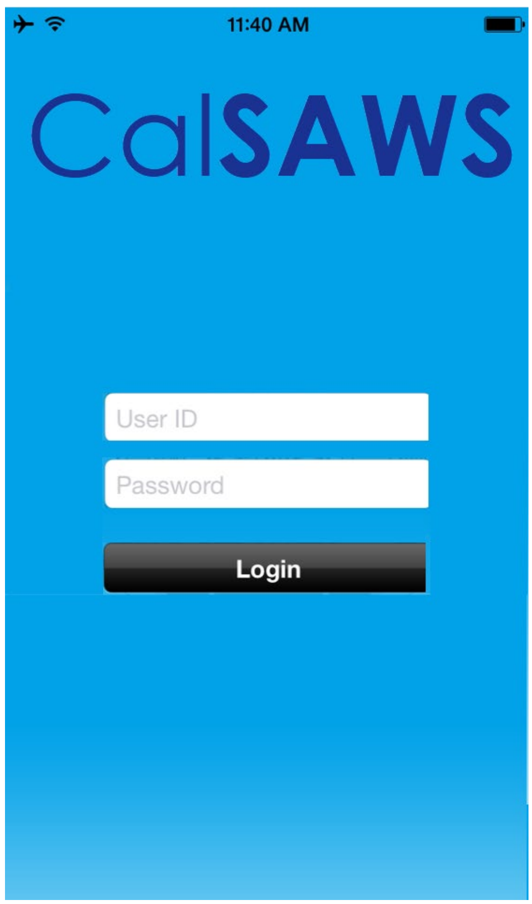


Figure 2.1.1a – Login Screen

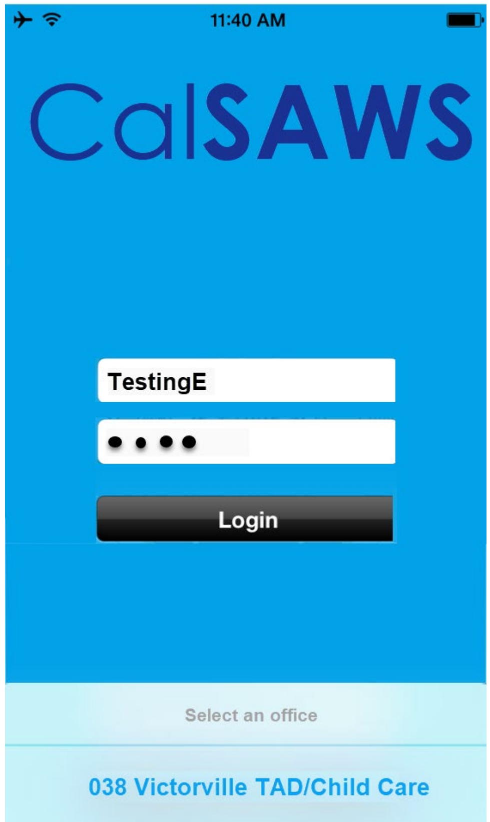


Figure 2.1.1b – Login Screen for workers outside of Los Angeles County

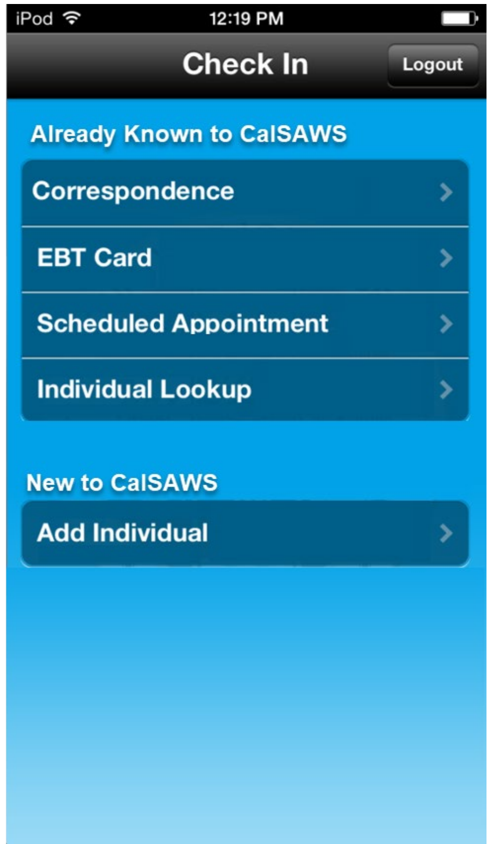


Figure 2.1.1c – Check-In Screen

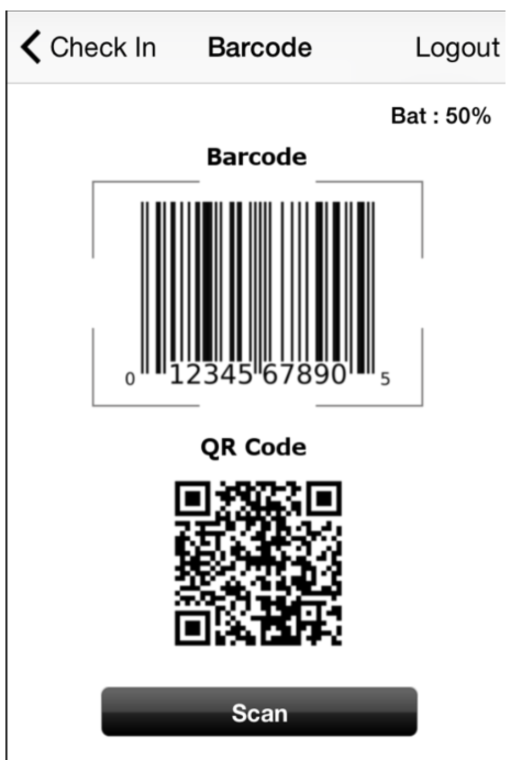


Figure 2.1.1d– Barcode Scanning Screen

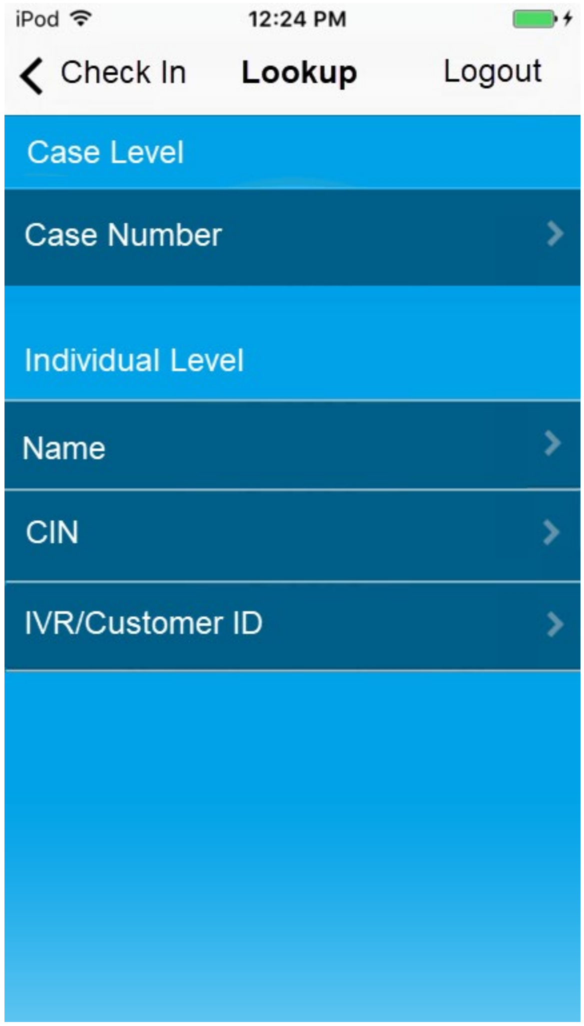


Figure 2.1.1e – Individual Lookup Screen for non-LA County users mockup

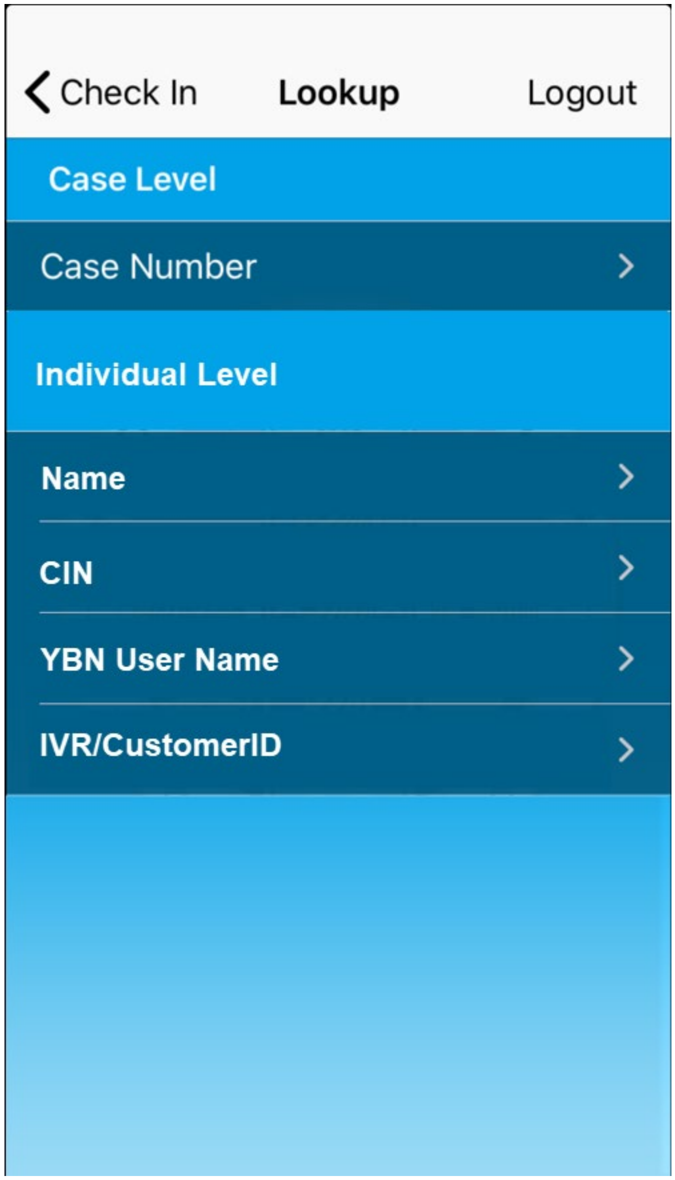
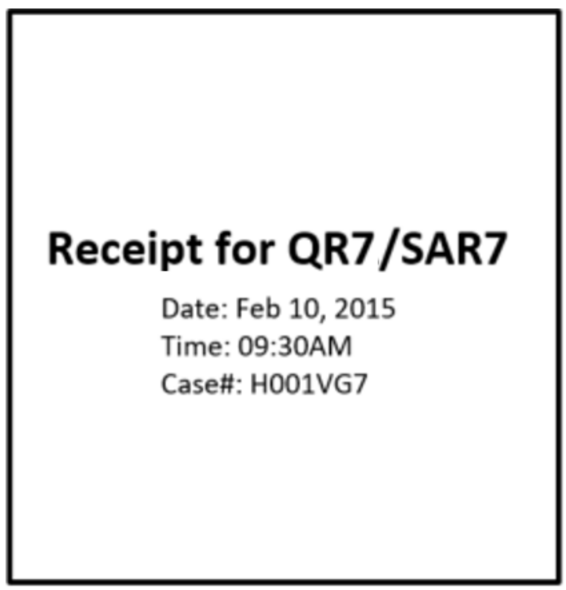


Figure 2.1.1f – Individual Lookup Screen for LA County users mockup


Receipt for Drop Off Document/s

Date: Feb 10, 2017
Time: 09:30AM
Case#: H001VG7

Figure 2.1.1g – Receipt for Drop Off Document/s


Receipt for QR7/SAR7

Date: Feb 10, 2015
Time: 09:30AM
Case#: H001VG7

Figure 2.1.1h – Receipt for QR7/SAR7

Figure 2.1.1i – Receipt for RD/RE

2.1.3 Description of Changes

1. Configure the Los Angeles County Lobby Check-in application to be accessible for counties outside of Los Angeles.
    a. Update the Los Angeles County Lobby Check-in application to allow workers outside of Los Angeles County to log in to the application using their CalSAWS credentials.
    b. Office information will continue to display after the worker login, displaying the office listing that they are associated to.
        i. Los Angeles County Lobby Check-in application will display offices outside of Los Angeles County if the worker that is logging in is associated to an office outside of Los Angeles County.
2. Remove the County of Los Angeles logo from all screen backgrounds as shown in Figures 2.1.1a through 2.1.1f
3. Add the CalSAWS system name to the top of the Login screen as shown in Figure 2.1.1a
4. Update the Check In screen as shown in Figure 2.1.1c.
    a. Relabel 'Already Known to DPSS' to 'Already Known to CalSAWS'.
    b. Relabel 'LRS Correspondence' to 'Correspondence'.
    c. Relabel 'New to DPSS' to 'New to CalSAWS'.
5. Update 'LRS – QR Code' to 'QR Code' from the Barcode screen as shown in Figure 2.1.1d.
6. Update the Individual Lookup screen as shown in Figure 2.1.1e.
    a. Hide the option to search by 'YBN Username' for workers that are logged in and accessing an office that is outside of Los Angeles County.

Note: For workers logged in accessing an office in Los Angeles County, the option to search by 'YBN Username' will remain as shown in Figure 2.1.1f.

7. Remove the 'County of Los Angeles', 'Department of Public Social Services', 'Save Time! Go On-Line!', and 'www.yourbenefits.laclrs.org' from the receipts for 'Drop Off Document/s', 'QR7/SAR7', and 'RE/RD' as shown in Figure 2.1.1g through Figure 2.1.1i.
    a. For 'Receipts for QR7/SAR7' relabel the header title 'Receipt for QR7-LA/SAR7' to 'Receipt for QR7/SAR7'.

   Note: These changes will apply to receipts being printed regardless if from the Print Receipt from the Purpose of Visit flow or from the Print Receipt from the Case Lookup flow.
8. Update the Number generation logic used for assigning a prefix and number to be stored in the LRS/CalSAWS instead of the YBN application.
    a. Number generated will be the next available number for the given office, regardless of prefix information.
    b. Apply a DCR to populate the existing prefix from YBN to the LRS/CalSAWS.
9. Provide the following information to ISD so that they can update the SFV Check-In Application accordingly.
    a. Provide ISD with the new end point information.
    b. Provide ISD with a list of which parameters that would need to be change.
    c. Assist in testing to confirm that the SFV Check-In Application is communicating to LRS/CalSAWS properly.

Note: The LRS Lobby Check-in Application will only support images uploaded to EDMS imaging solution until CA-214026 (DDID 2192) is implemented.

2.1.4 Page Location

- **Los Angeles County Lobby Check-in Application**

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 Kiosk User Interface

2.2.1 Overview

The Kiosk is a Self-Service application used in the lobby to assist customers with easy check-in and scanning documents. The Kiosk is customized using the Device Management pages in the LRS/CalSAWS that will be migrated as part of CA-207405. The Kiosk displays in English and Spanish and integrates with the Reception Log.

2.2.2 Kiosk Mockup

Figure 2.2.1 – Welcome Screen

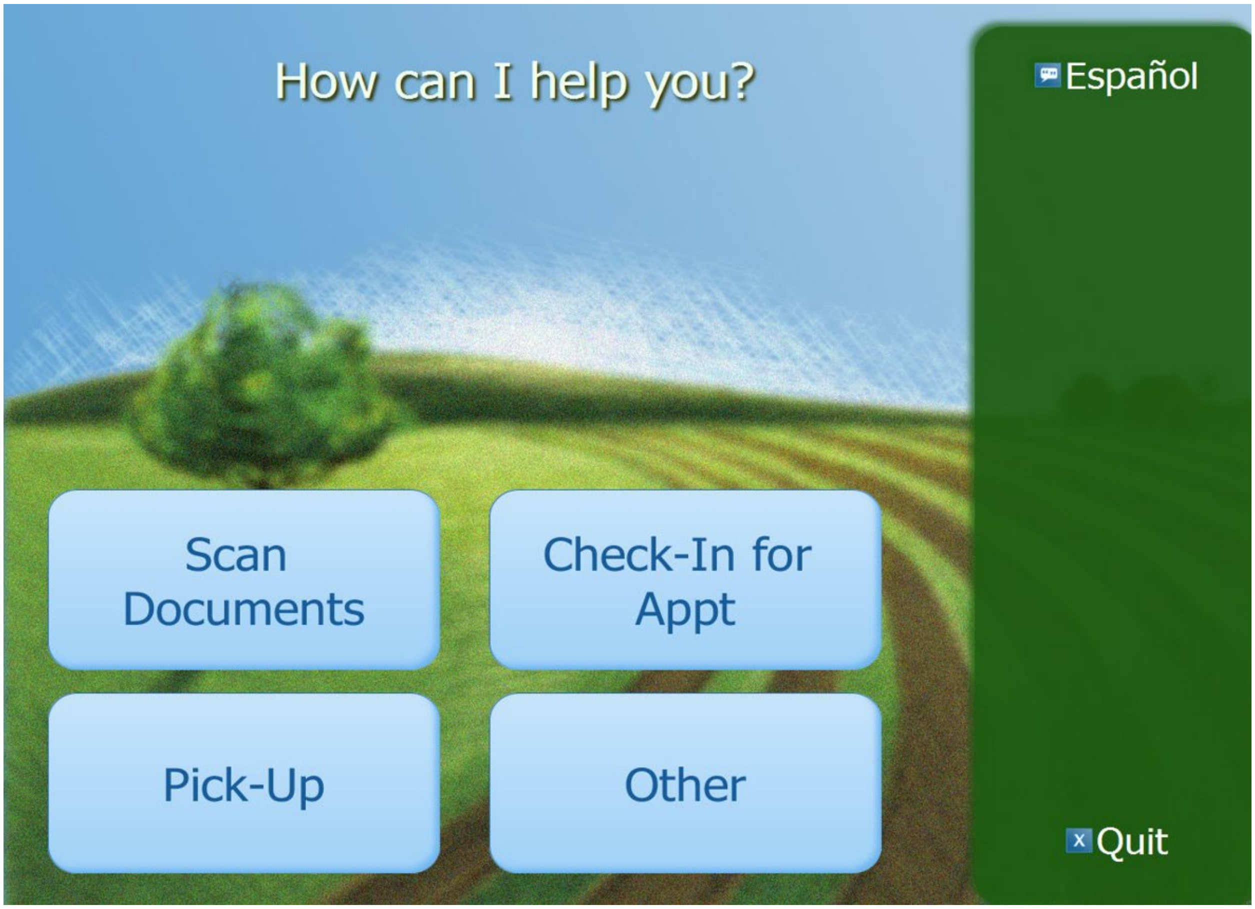


Figure 2.2.1b – Action Button Screen

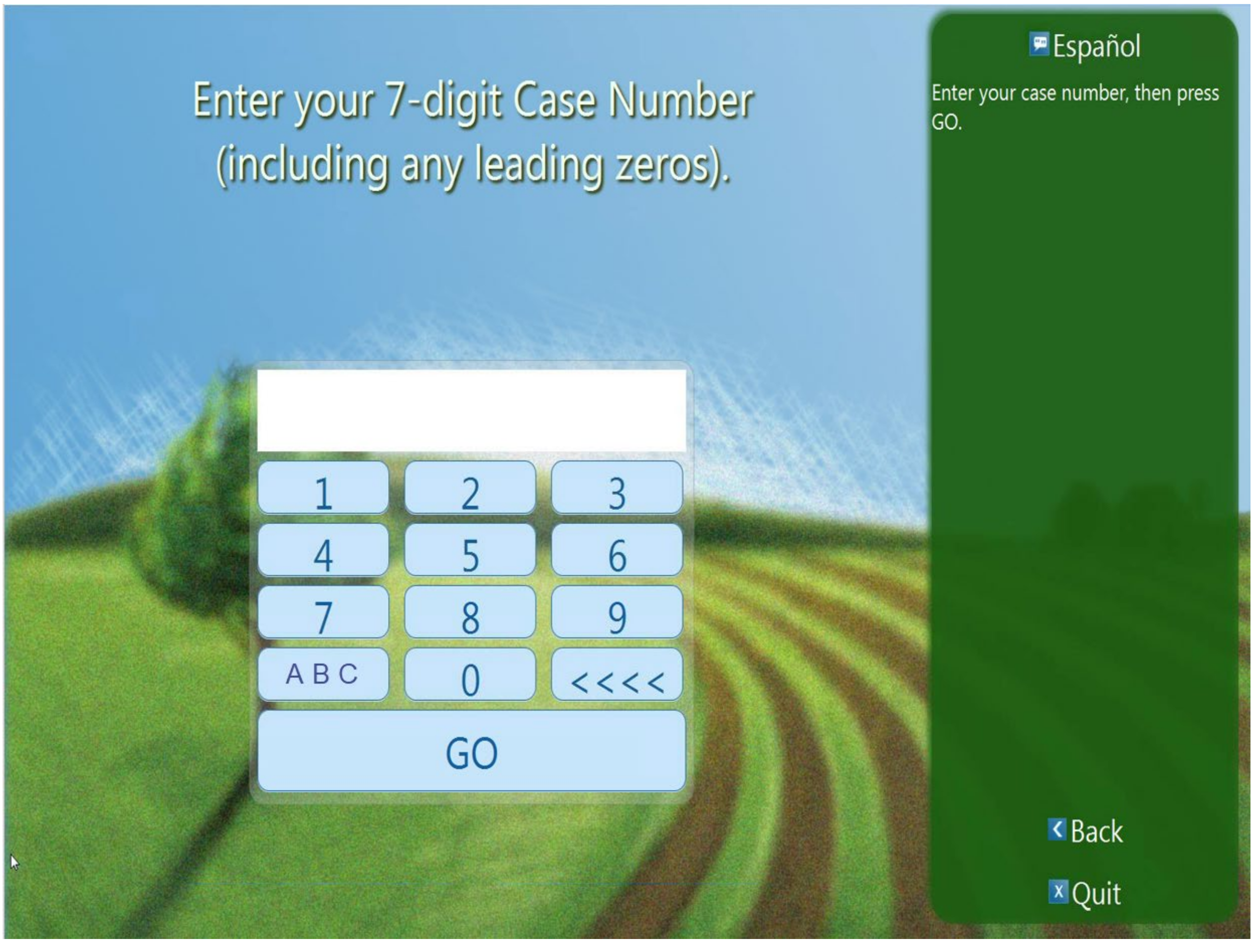


Figure 2.2.1c Case Number Screen with numbers

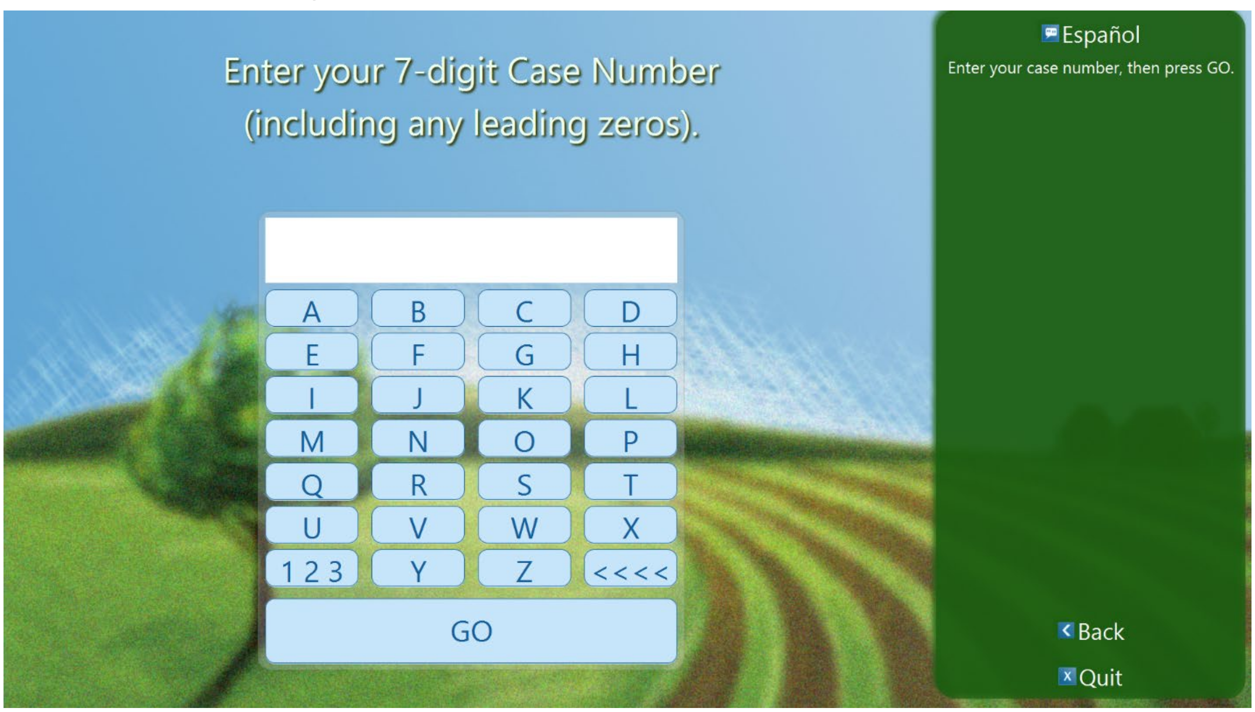


Figure 2.2.1d Case Number Screen with letters

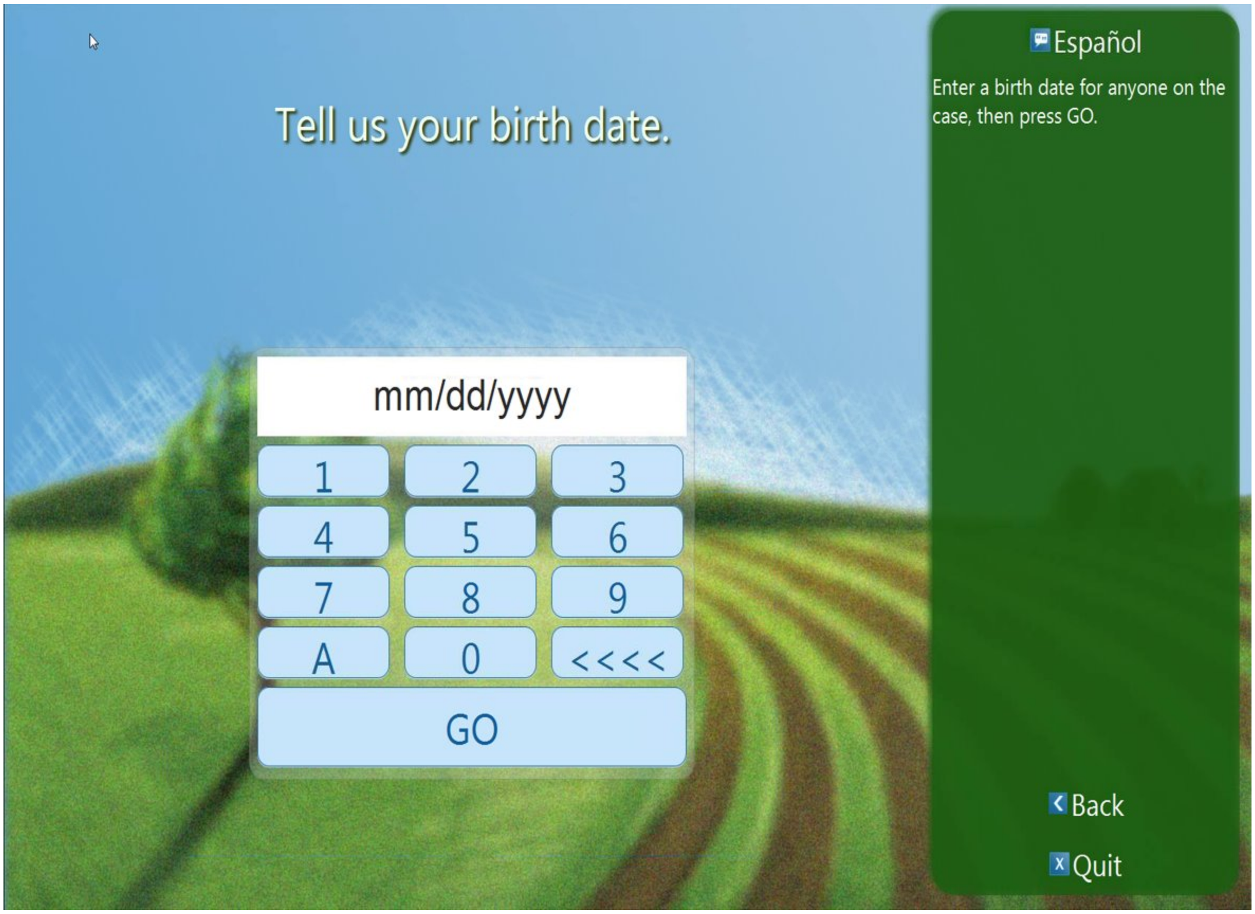


Figure 2.2.1e Birth Date Screen

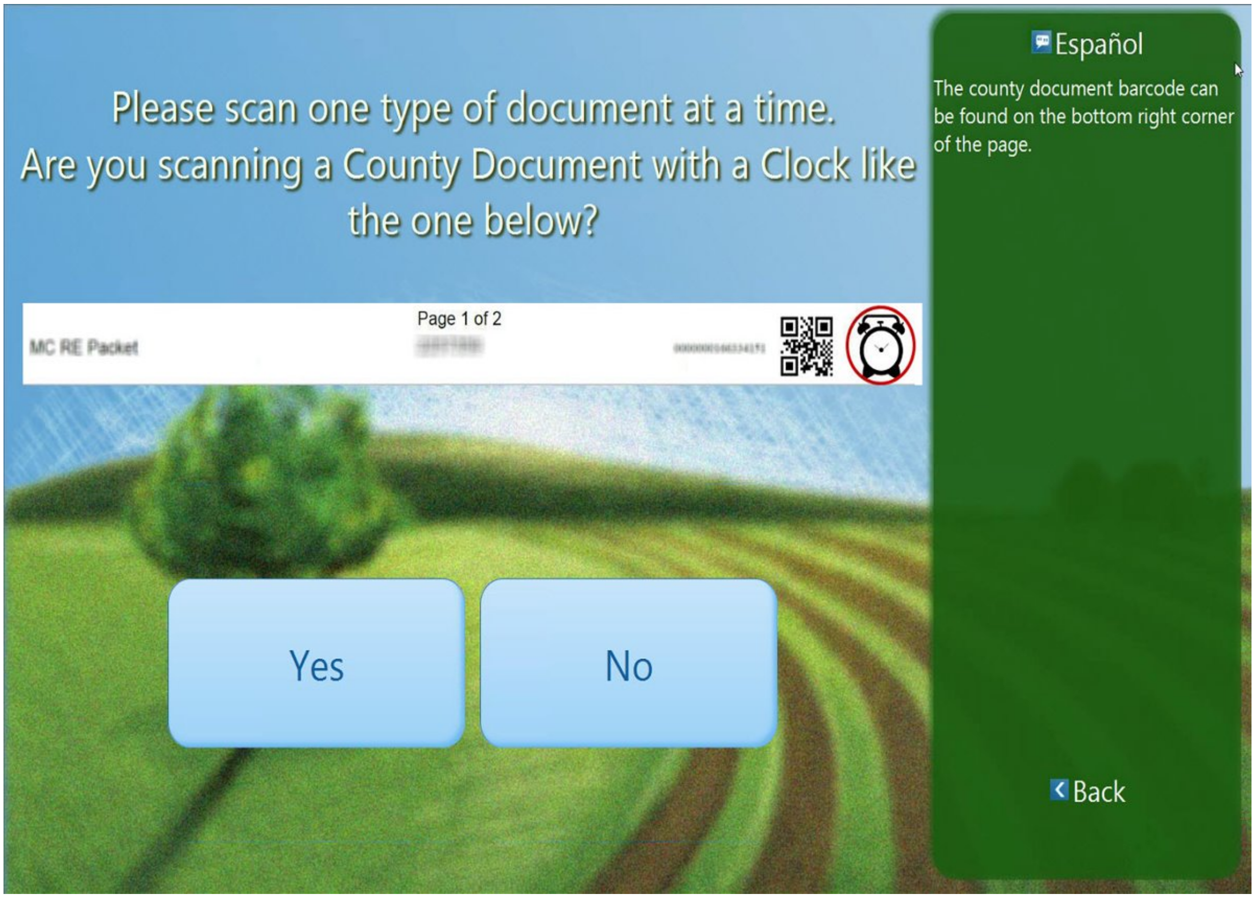


Figure 2.2.1f Document Scan Screen

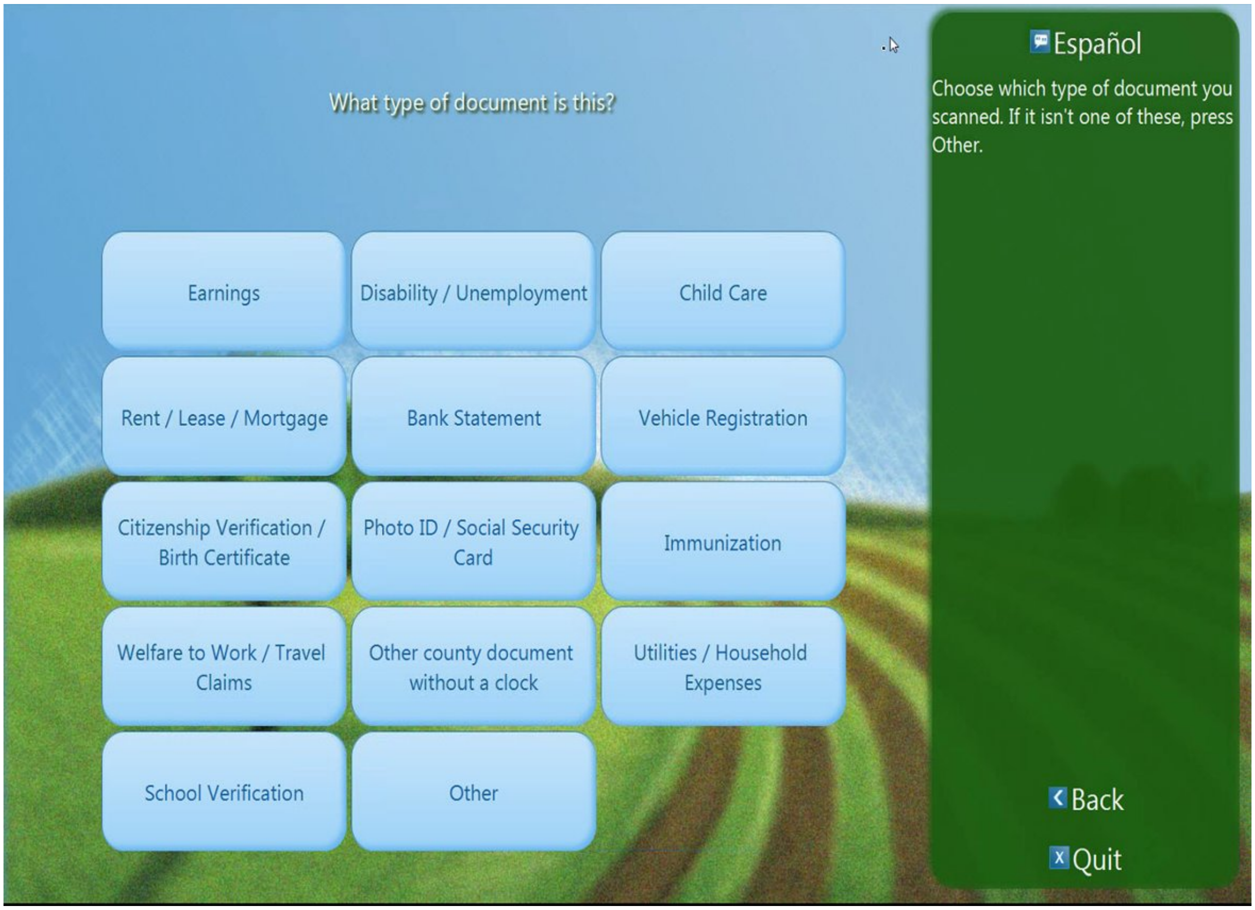


Figure 2.2.1f Document Type Screen

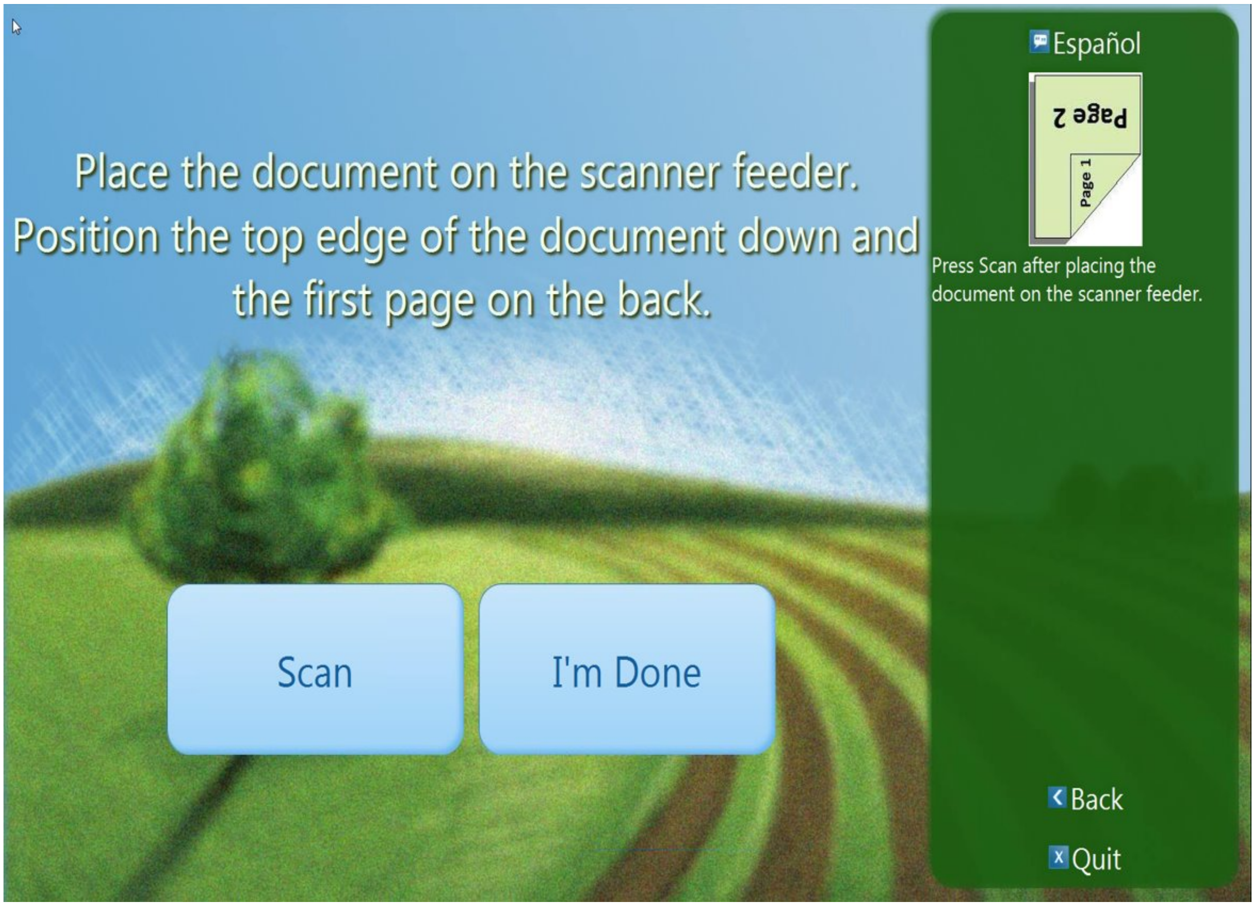


Figure 2.2.1f Document Instructions Screen

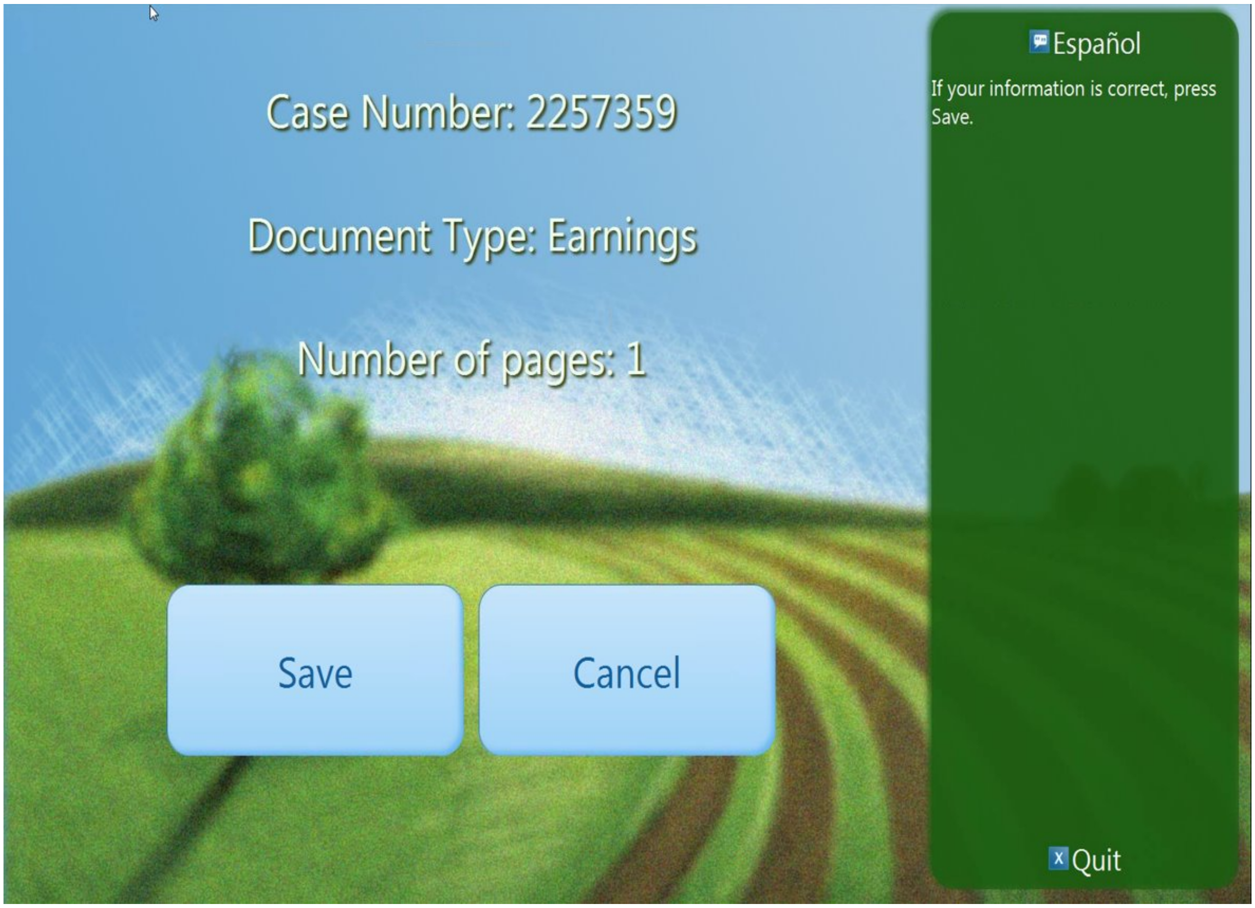


Figure 2.2.1f Document Confirmation Screen

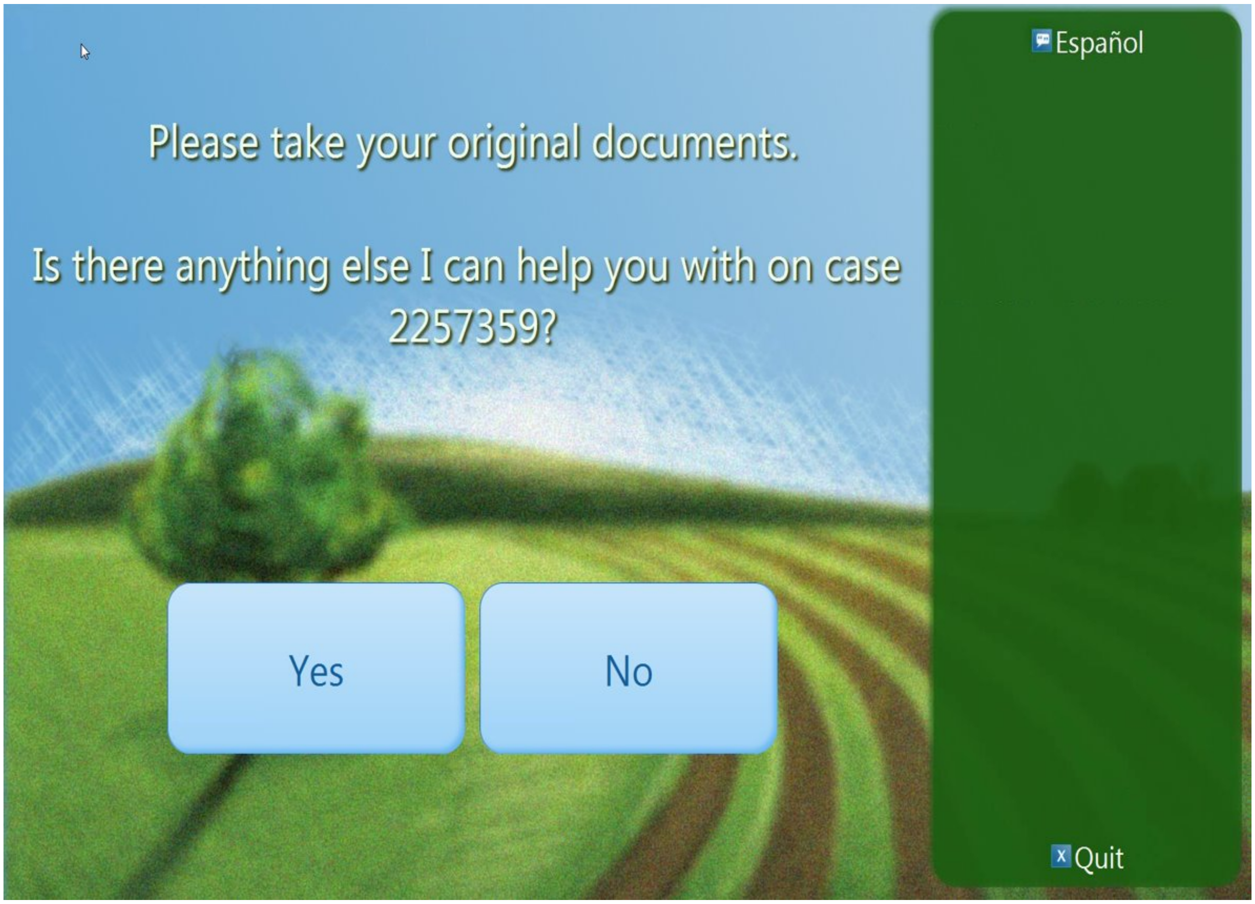


Figure 2.2.1f Document Final Screen

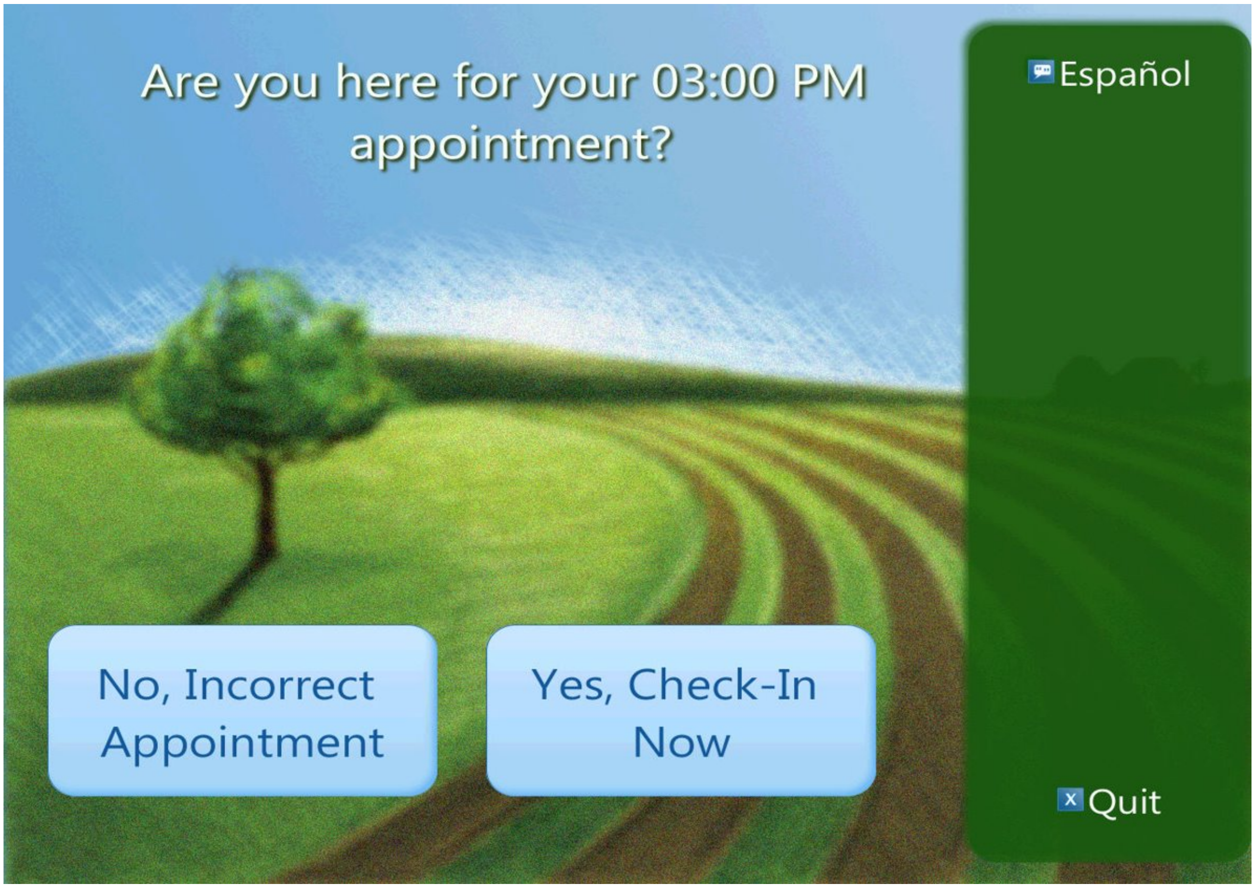


Figure 2.2.1g Appointment Check-in Screen

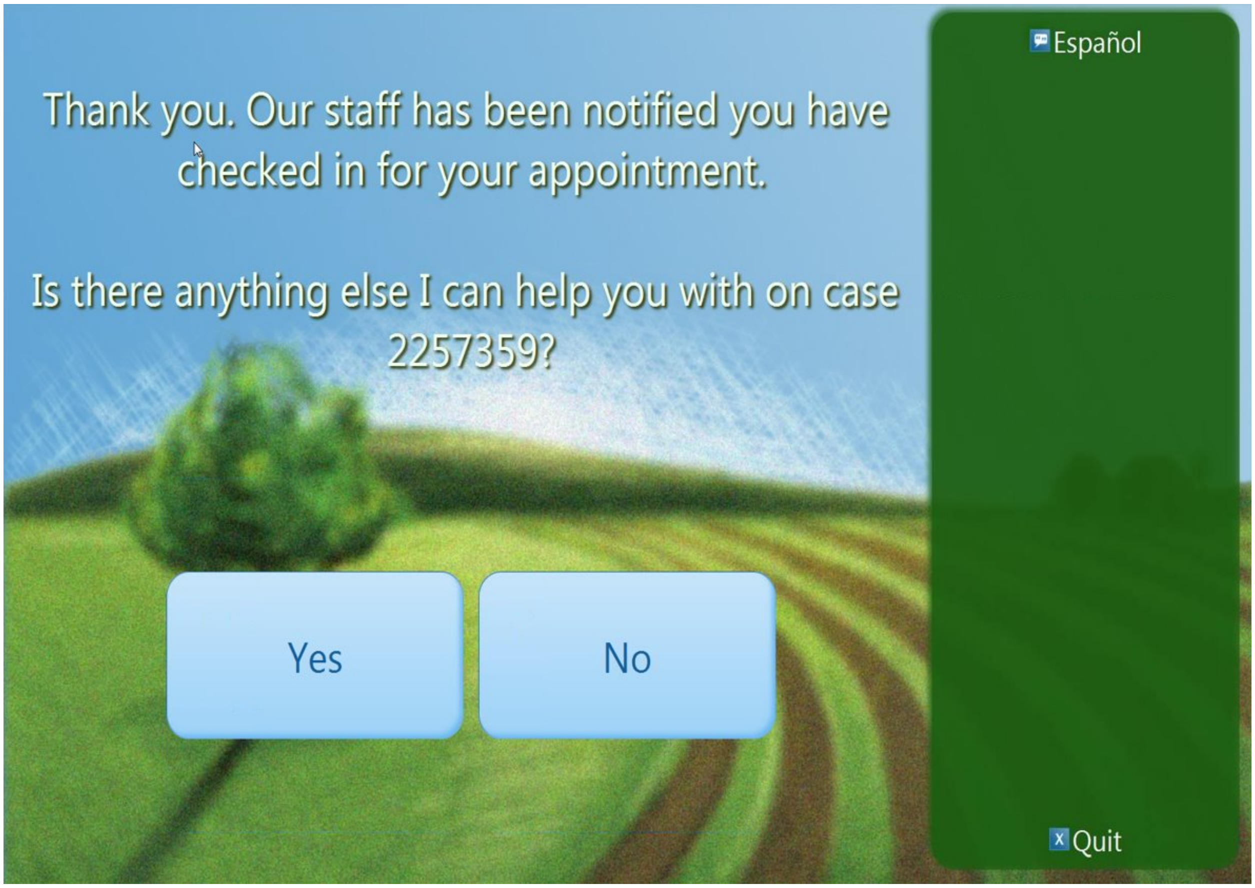


Figure 2.2.1h Appointment Confirmation Screen

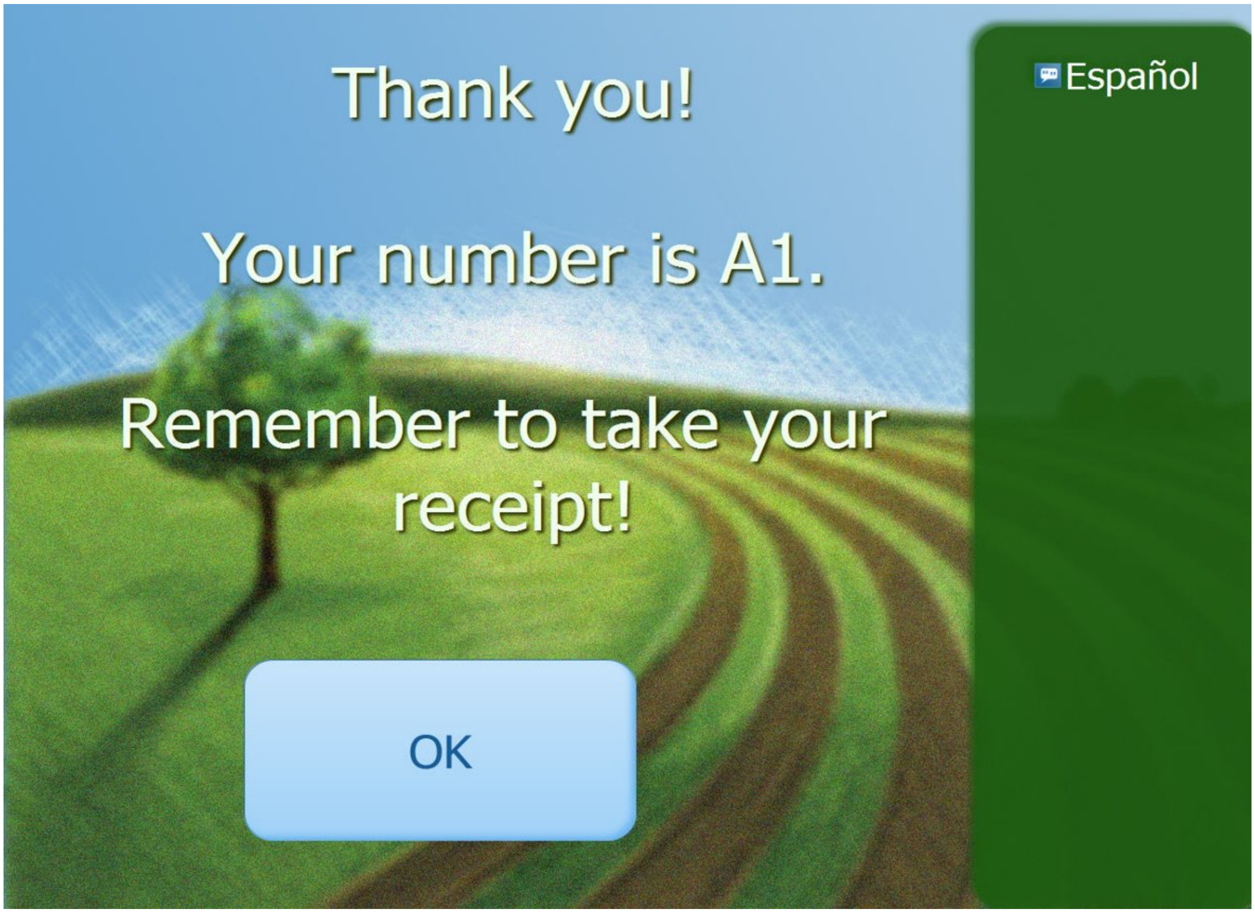


Figure 2.2.1i – Print Receipt Screen

2.2.3 Description of Changes

1. The button labels for the Action Button screen as seen in Figure 2.2.1b will be determined from the Action Detail page within the Device Flow Management page.
2. The Kiosk will authenticate the Customer using Case Number and Birthdate or EBT/BIC card for existing customers checking in.
    a. If the customer selected the Case Number/Date of Birth validation or swiped their BIC card, the name of the person identified will be used as the Person Name for the Reception Log entry.
        i. Validation for Date of Birth and Case Entry:
           Date of Birth XX/XX/XXXX does not match any person on case XXXXXXX.
    b. If the customer swiped their EBT card, the Case Name will be used as the Person Name for the Reception Log entry.

        i. Validation for EBT Card:
            1. Error reading your card.
            2. Could not find a case from your card.
    c. If the Kiosk cannot validate the case, the customer will receive the following error on the screen: "Your request cannot be processed, please check in for further assistance."
3. The "On Screen Instructions" will be determined from the Action Detail page in the Kiosk Flow Management pages.
    a. If the customer did not go through case validation, the question will display as "Is there anything else I can help you with today?"
    b. If the customer did go through case validation, the validated case will display in the question.
    c. If the customer answers the question with "Yes", navigate to the Action Selection screen maintaining the case previously verified.
    d. If the customer answers the question with "No", navigate to the Final screen.
    e. This will save the customer's actions in the Reception Log Visit Information section and print the receipt for the customer.
4. For the Print Receipt screen If any action the customer took returned a number, display the message "Your number is <Number Assigned>."
    a. If any action the customer took prints a receipt, display the message "Please take your receipt."
    b. The receipt printed will include the information for all the actions the customer took during their session. Each Visit type record that is created will be given a separate number that will be printed on the receipt.
    c. The office address printed on the receipt will be populated from the address stored in LRS/CalSAWS.
5. When scanning a document on the Kiosk, if the document being scanned is a tracked barcoded document (which displays a clock icon), the document will be marked as received on the case.
    a. The Reception Log entry created will automatically have a Completed status after Waiting.
    b. Validations for Scanning documents:
        i. Could not identify your document. Please scan again or take it to the receptionist.
        ii. Error, no pages scanned.

    Note:

        i. Updates to the tracked barcoded documents with the clock icon are part of CA-207108 (DDID 2302) which is in a later release.
        ii. When scanning documents into the Kiosk the corresponding text campaign will send a text message.

This is part of CA-207106 (DDID 2305) and is in a later release.

iii. Uploading documents from the Kiosk into Imaging is part of CA-214026 (DDID 2192) and will be in a later release.

6. When checking in for an appointment the Kiosk will search CalSAWS for scheduled and rescheduled customer appointments for the case number entered by the customer.
    a. The following customer appointment types will not be included in the search: Home Visit and Telephone Interview.
    b. If the customer entered a case number that does not have an appointment that day, display the following message:
        i. There is no appointment for your case today. Please select another option or ask for more assistance.
    c. If there is an appointment for the next day or previous day, the following message will display depending on the appointment date:
        i. There is no appointment for your case today. There is an appointment for your case tomorrow. Please select another option or ask for more assistance.
        ii. There is no appointment for your case today. There was an appointment for your case yesterday. Please select another option or ask for more assistance.
    d. If there are multiple appointments for that day, display a screen indicating the times for the appointments that day and allow the customer to select the correct appointment time.
    e. Once the customer has completed their actions on the Kiosk, the customer appointment that was selected will be updated with a status of "Showed". This status will be added to the Customer Appointment Detail page.
    f. Validations for appointments out of office:
        i. The appointment for your case is not in the office. Please select another option or ask for more assistance.
7. The Kiosk Case Number screen will be updated to display options for both letters and numbers.
    a. Update the 'A' button on the existing Case Number screen to display 'A B C' as shown on figure 2.2.1c
        i. Choosing the 'A B C' button will take the customers to the Case Number screen with the option to enter 'letters' as shown on Figure 2.2.1d.
            1. Screen will display each letter individually.
            2. Choosing the '1 2 3' button will take the customers back to the Case Number screen with the option to enter 'numbers'.
            3. Clicking the 'GO' button will take the customer to the DOB screen (this is the same process flow as existing Case Number screen).

    b. Case Number information that the customer has entered will display accordingly as they go back and forth between the screens that display the two options (letters and numbers).
    c. Kiosk will default to the Case Number screen that displays the option to enter numbers.
8. The Currently Unavailable screen will display when a Kiosk has not been assigned a flow or when the Kiosk is not connected to the system network.
9. The Kiosk will not allow Confidential Cases (except Employee/Employee Relative), Minor Consent or Duplicate Cases check in to the Kiosk.
    a. Confidential Cases with the type of Employee/Employee Relative will be allowed to check in using the Kiosk.

2.2.4 Page Location

N/A

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 FACT User Interface

2.3.1 Overview

The FACT allows the Worker to login using their LRS/CalSAWS credentials in order to assist customers in the lobby. This includes checking them in for appointments and scanning appointment letters. With the appropriate security right assigned, the FACT can also be used for assigning Kiosk flows.

2.3.2 FACT Mockup

Figure 2.3.1a FACT Login Screen Mockup

Figure 2.3.1b FACT Login Error Screen Mockup

Figure 2.3.1c FACT Unassociated Office Error Screen Mockup

Figure 2.3.1d FACT Home Screen Mockup w/ Configure Kiosk Option Mockup

Figure 2.3.1d FACT Home Screen Mockup without Configure Kiosk Option Mockup

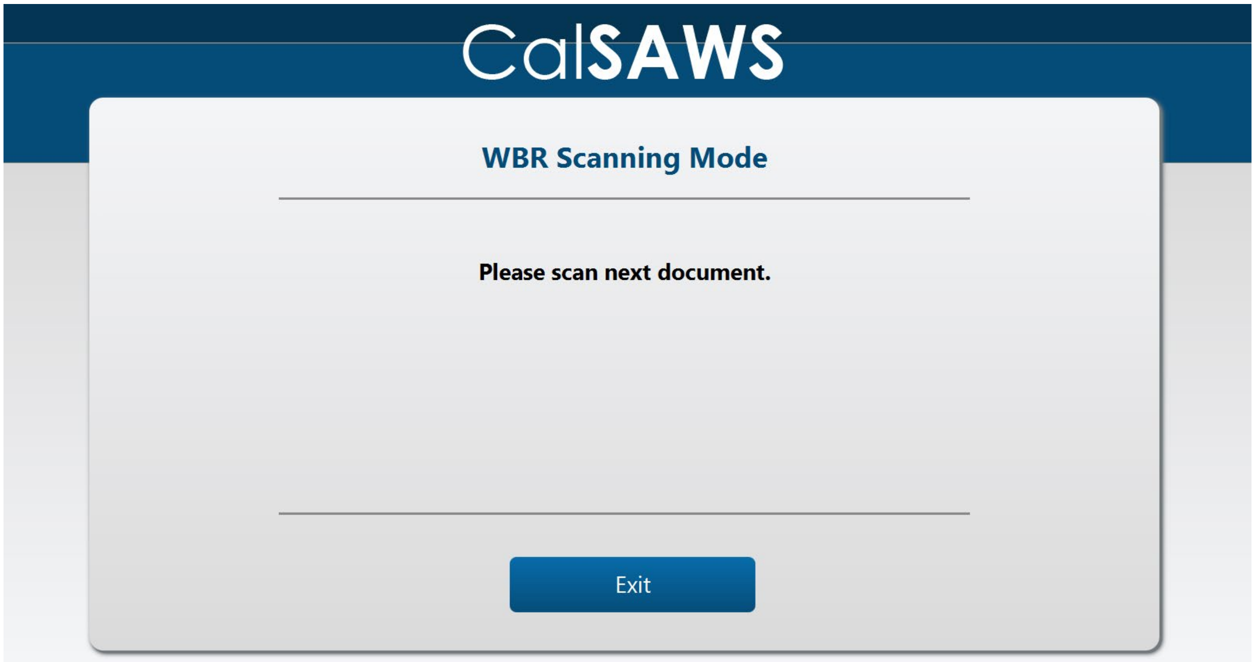


Figure 2.3.1e FACT WBR Scanning Mode Mockup

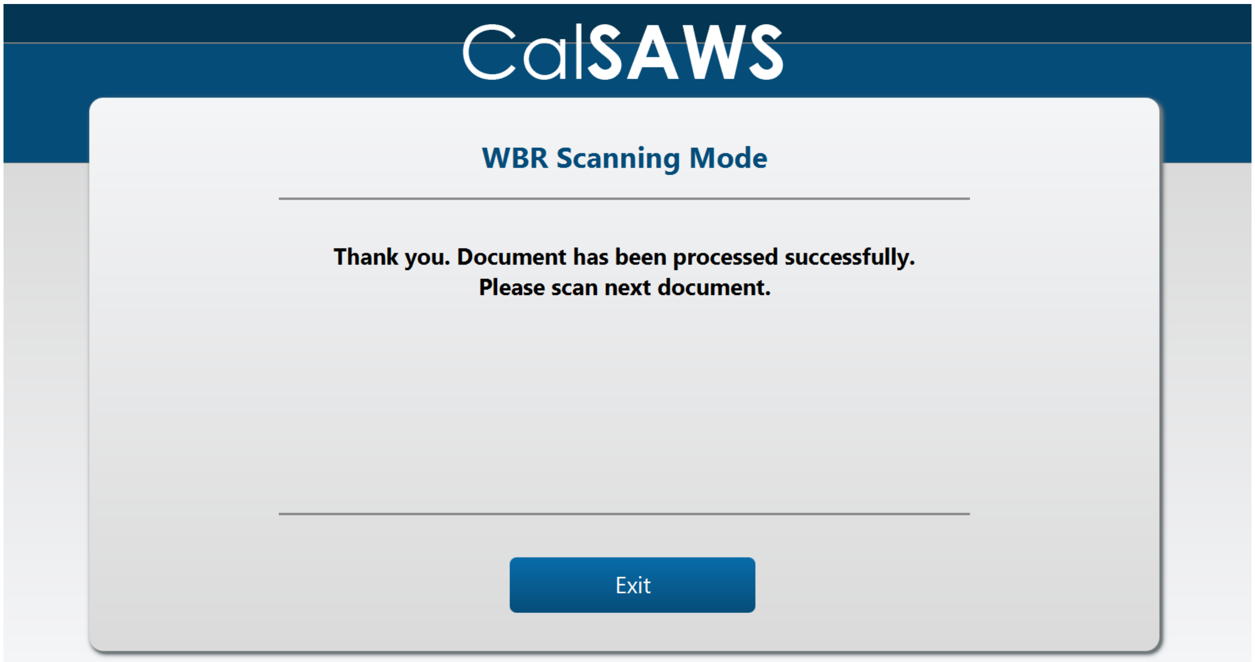


Figure 2.3.1f FACT WBR Scanning Mode Successful Mockup

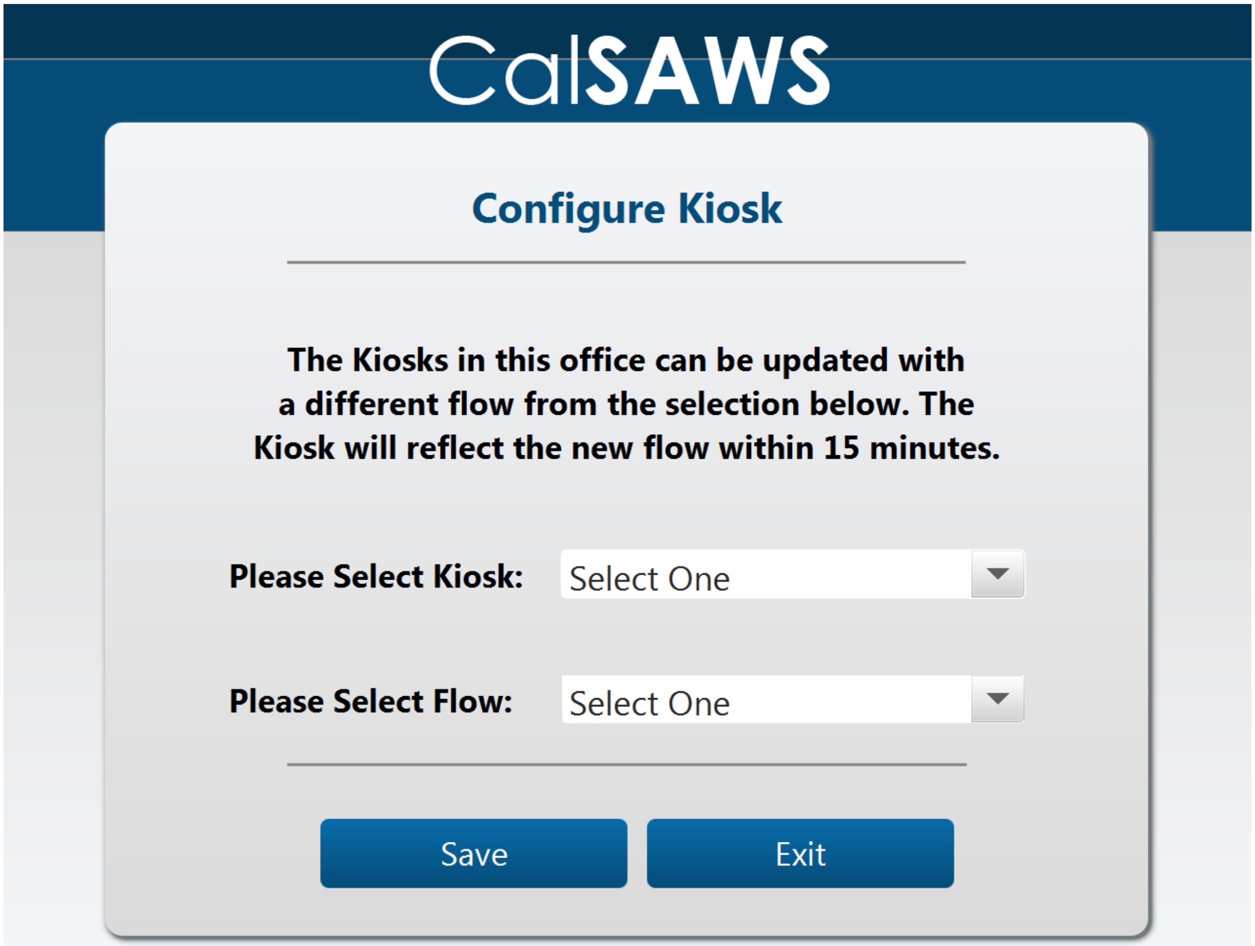


Figure 2.3.1g Configure Kiosk Mockup

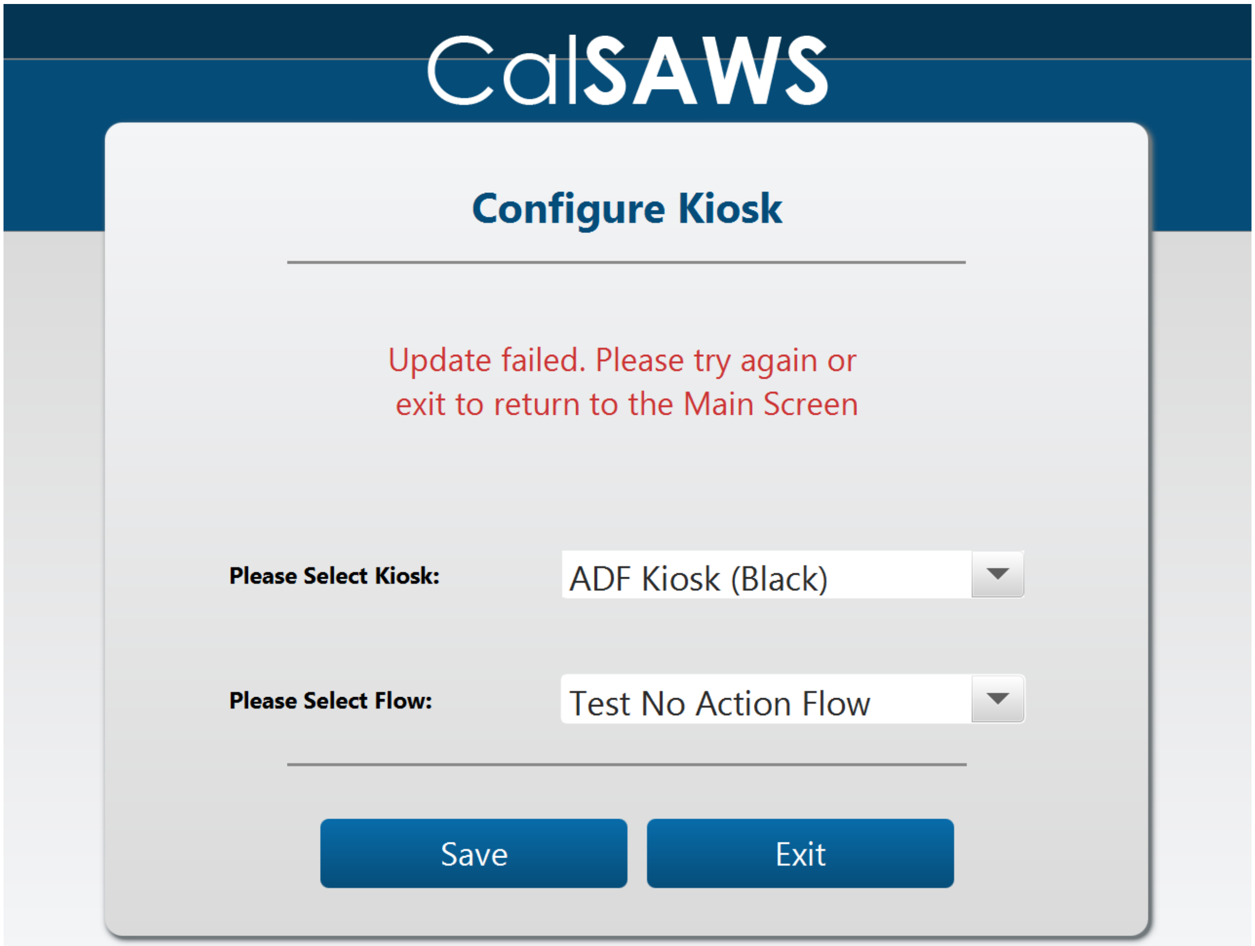


Figure 2.3.1h Configure Kiosk Error Mockup

2.3.3 Description of Change

1. Update the logo and all error verbiage from C-IV to CalSAWS.
2. The user will enter their LRS/CalSAWS credentials in order to log in to the FACT.
   a. If the login fails, the following message will display: "Login failed. Please try again or log in to CalSAWS to verify your password."
   b. If the tablet has not been associated to an office through the Device Assignment Detail page, the following message will display: "This FACT is not associated to an office. Please log in to CalSAWS and specify the office on the Device Assignment Detail page."
3. Kiosk Flow button will take the User to the Kiosk Flow that has been set up for the FACT in the Device Management pages.
   a. No Document Upload functionality is supported through the flow on the FACT. The WBR Mode will need to be used in order to mark tracked barcoded documents as received.

    b. The Remote Kiosk Configuration security group will display the button, allowing the user to use the FACT to configure the Kiosk flow.
        i. Note: This Security Group already exists in the LRS/CalSAWS system.

4. WBR button will allow a user to scan the barcode of either an appointment letter to check them in for the appointment, or a tracked barcoded document to mark the document as received in the LRS/CalSAWS by using the built-in camera in the tablet to read the barcode.
    a. A receipt will be printed based on the setting in the WBR section of the Device Assignment Detail page.
    b. A worker notification will be sent based on the WBR settings from the Device Assignment Detail page.
    c. The following messages will display when an error occurs using the WBR Scanning Mode.
        i. "Failed to initialize barcode reader." This will occur when there is an issue with the barcode reader.
        ii. "Print failed, please scan the document again." This will occur when the printer was not able to print a receipt.
        iii. "Scan failed, please scan the document again." This will occur when the scanner was not able to read the barcode.

    Note: Uploading documents from the Kiosk into Imaging is part of CA-214026 (DDID 2192) and will be in a later release.

5. Configure Kiosk button will allow a user of the FACT to change the flow that is assigned to a Kiosk.
    a. The flow of a FACT cannot be changed from this screen.
    b. The button will only display if the User logging in has the correct security rights.
    c. If the new Kiosk and Flow configuration does not get updated, the following message will display: "Update failed. Please try again or exit to return to the Main Screen."

2.3.4 Page Location

N/A

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 Reception Log

2.4.1 Overview

The Reception Log Detail page displays all Visit Information for each Reception Log entry that is created. When a Customer checks in using one of the Lobby Applications, a Reception Log Detail record is created with the specified Visit Information. The Status of the visit along with how it is created is displayed in the hover over tooltip on the Status field in the Visit Information Section

2.4.2 Reception Log Detail Mockup

Time	Status	Notified Worker	Message	E-mail	Created By
10:52 AM	Kiosk Start				Kiosk
10:52 AM	Waiting				Kiosk
10:52 AM	Worker Notified	36LS06ZB05	N	N	Kiosk
10:52 AM	Worker Notified	36LS18DS0Y	Y	N	Kiosk
10:52 AM	Worker Notified		N	Y	Kiosk
11:01 AM	Complete				Melissa Breezefeather

Figure 2.4.1 Reception Log Detail Status Hover Tooltip Mockup

2.4.3 Description of Change

1. Once the customer is checked in using the Kiosk a Reception Log entry will be created with the visit type that is mapped to the button using the Device Admin pages in the LRS/CalSAWS.

a. When checking in the Reception Log will display the Kiosk Staff record name that is associated with the Kiosk/FACT in the Created By section when hovering over the Status tooltip.
b. The initial status record when checking in through the Kiosk flow will be Kiosk Start.
c. The Second status when checking in will be set to Waiting except for when the Customer is only scanning documents.
d. The number and specified prefix will display in the Number Column on the Reception Log Detail page.

Note: The Los Angeles Check-in Lobby app flow for Reception Log will not be changed.

2.4.4 Page Location

Home Page – Reception Log link

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 Web Service Updates

2.5.1 Overview

The current web services for the Los Angeles County Lobby Check In application currently reside in the YBN Application. These web services will be moved to the LRS/CalSAWS since YBN is being replaced with a 58 county Self-Service Portal. The web services that support the C-IV Lobby Kiosk and FACT will be moved to the LRS/CalSAWS.

2.5.2 Description of Change

1. Create the web services in the LRS/CalSAWS to support the Los Angeles County Lobby Check In application used by County Workers to check in customers. See Supporting Documents Section 1 for detailed web service information.

2. Create the web services in the LRS/CalSAWS to support the C-IV Lobby Kiosk and FACT applications. See Supporting Documents Section 2 for detailed web service information.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Online	List of web services to be removed from YBN and created in LRS/CalSAWS to support the LA County Lobby Check-In application.	DDID 1778 LRS App Web Services.xlsx
2	Online	List of Web Services required for porting the C-IV Kiosk and FACT to LRS/CalSAWS.	DDID 1778 CIV Lobby Web Services.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1778	**Original:** The CONTRACTOR shall expand the Los Angeles County's iOS solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties. **Revised:** The CONTRACTOR shall expand the Los Angeles County's iOS Lobby Check-in solution to support all 58 Counties. The C-IV java solution shall also be integrated to support the current Kiosk and FACTs for use by all 58 Counties.	- The YBN web service that supports the IOS apps will be rearchitected to work independent of the self-service portal with CalSAWS directly. Dependencies on the self-service portal and modifications to it to support the iOS apps will be part of the new self-service portal. - The Printing devices and Scanning devices will not change for any application. - Estimate includes current features in LRS iOS and C-IV Lobby/FACT applications, no additional features. - Transferring data is not part of this estimate as the Statewide Self-Service Portal is not within the scope of CalSAWS migration. - This estimate does not include the External Mobile App as the Statewide Self-Service Portal is not within the scope of CalSAWS migration. - The Los Angeles County's iOS solutions will require modifications and access to the C4Yourself and Benefits CalWIN Self Service Portal in order to work for the remaining 57 counties. Since the Self- Service Portal modifications are not to be included within the scope of this CalSAWS Migration D&I Project these changes will not be estimated or accounted for. Once the CONSORTIUM identifies the approach and requirements for the Self Service portal, they will be calculated by the CONTRACTOR and reviewed and prioritized by the CONSORTIUM for	Updated the LRS iOS solution to include the CalSAWS system name and support all 58 counties. Migrated the existing C-IV Kiosk and FACT applications to the CalSAWS system.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
		approval through the County Change Control Board process. - The iOS Lobby Check-in Solutions in this estimate will only be supported for Los Angeles County until the Self-Service Portal has been addressed. - The purchase of any new iOS device, kiosks, or FACTs is not accounted for. - Additional counties electing to use the supported iOS, kiosk, or FACT devices that currently do not utilize these devices is not accounted for. - Test equipment for iOS devices will continue to be provided by LA County as they are currently provided today in LRS. - This estimate does not account for onsite support for updates to the iOS and Kiosk systems. Support will continue to be provided how it is currently provided in the LRS and C-IV systems.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207405 | DDID 1024, DDID 1025

Migrate the Device Management pages

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/26/2020	1.0	Original Document	Melissa Mendoza
07/15/2020	1.1	Updated per QA Comments	Melissa Mendoza
07/24/2020	1.2	Updated per Deliverable Comments	Melissa Mendoza
07/27/2020	1.3	Updated Design section 2.2.3.1 per CalSAWS DEL 37 Comments Log	Jasmine Chen
09/02/2020	2.0	Updated per Content Revision 1. Updates have been highlighted.	Melissa Mendoza

Table of Contents

1 OVERVIEW

1.1 Current Design

In the C-IV System there are Device Management administrative pages that are required to support the Kiosk and Facilitated Access Control Tablet (FACT) Lobby solutions. The Device Management pages need to be migrated from C-IV to the LRS/CalSAWS to support DDID 1778, which will migrate the C-IV lobby solution to the LRS/CalSAWS.

1.2 Requests

Per DDID 1024, migrate the Device Assignment Detail page.

Per DDID 1025, migrate the Device Flow Mgmt. task navigation, Flow Management List, Flow Management Detail and related child pages.

1.3 Overview of Recommendations

1. Migrate the Device Assignment Detail page to the LRS/CalSAWS.
2. Migrate the Flow Management List and Flow Management Detail pages to the LRS/CalSAWS.

1.4 Assumptions

1. Setting up and ordering the Kiosk or FACT must be done with the Lobby Management team before a County can use the Administrative pages to manage their devices.
2. The Task for document upload from the FACT or Kiosk will be handled with DDID 1628.

2 RECOMMENDATIONS

Migrate the Device Assignment Detail page into the LRS/CalSAWS. These administrative pages are necessary for modifying the Kiosk and FACT, which includes Wireless Barcode Reader (WBR) mode, for the C-IV counties that are currently using the devices, and for future counties to manage the Kiosk or FACT devices. Customers can use the Kiosk to check in for appointments or be directed to a specific window as defined with the Flow Management pages. Each time a customer uses the Kiosk, the Reception Log will be updated with the information the customer selected on the Kiosk. In addition, the FACT allows a worker to check in customers for appointments using their appointment letters using the tablet camera in Wireless Barcode Reader (WBR) mode, change the Kiosk flows that are in a lobby, and also act as a Kiosk from the tablet.

2.1 Device Assignment Detail

2.1.1 Overview

Migrate the Device Assignment Detail page to the LRS/CalSAWS to support the existing Kiosk and FACT tablets. The Device Assignment Detail page will be used to set up the Kiosks and FACTs in the county. The page will default to list all the devices that do not have an office assigned.

2.1.2 Device Assignment Detail Mockup

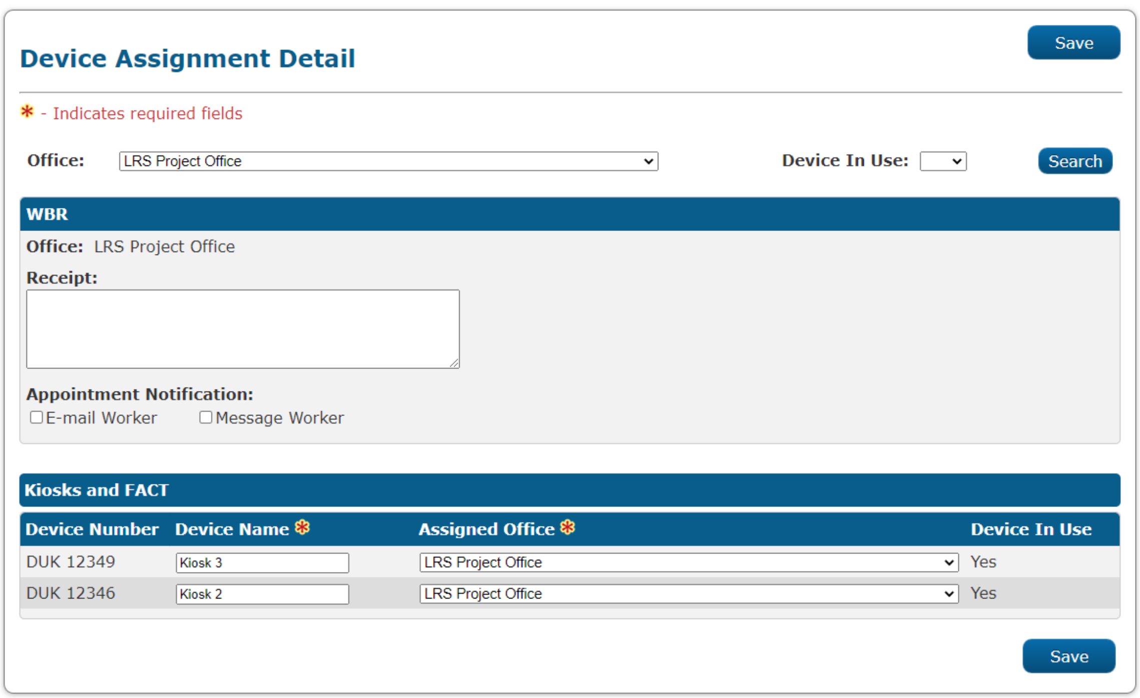


Figure 2.1.1a Device Assignment Detail Mockup – with WBR

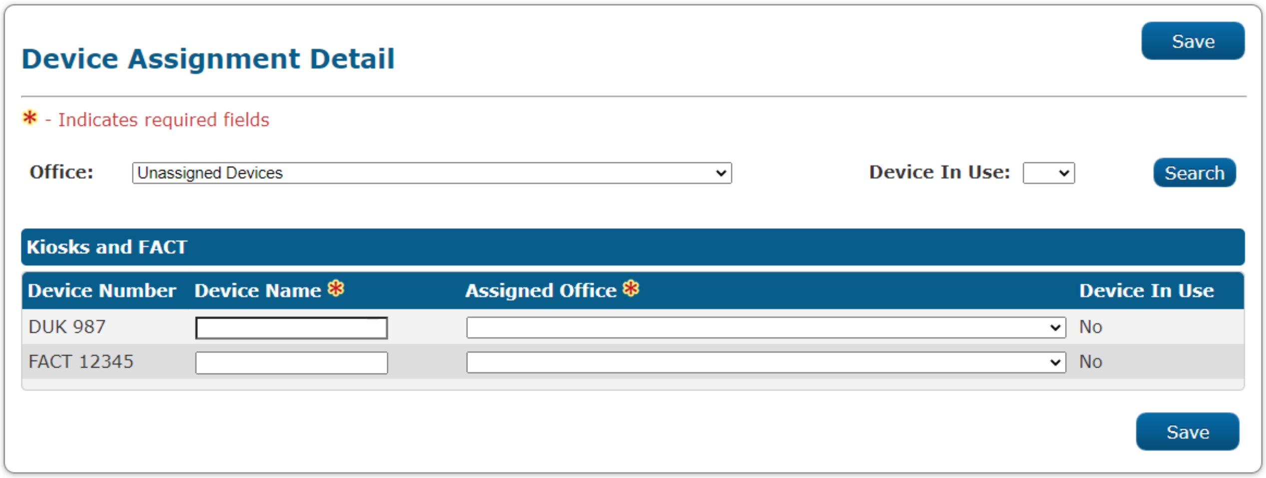


Figure 2.1.1b Device Assignment Detail Mockup – Without WBR

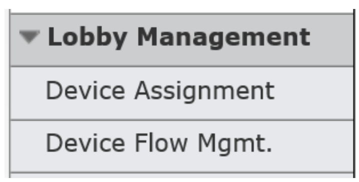


Figure 2.1.1c Lobby Management Task Navigation

2.1.3 Description of Changes

1. The Device Assignment task navigation will open the Device Assignment Detail page in a standard and sizable pop-up window. The Task Navigation will include a new dropdown section called Lobby Management which will only appear if the User has security access to one or more of the Task navigation elements that appear under it. This new Lobby Management section will appear at the bottom of the task navigation.
    a. The navigation items for the Device Assignment and Device Flow Mgmt. will only appear with both the security rights and when the Codes Table for "Kiosk Enabled" CT15_RT43 indicator set to Yes ("Y").
    b. Rename the existing Kiosk Assignment and Kiosk Flow Mgmt. to Device Assignment and Device Flow Mgmt.
2. The page will default to list all the devices that do not have an office assigned. The user can also access other offices in the county.

3. The user will be able to define a device name and select the office in which the device is located.
4. The user can include WBR information on the Device Assignment Detail page. The WBR information will be used on the FACT when using WBR Mode. Also, the user can send notifications via e-mail or Message Center to the worker. This is done at an office level instead of at the county level. E-mail/Message notifications will be sent only if an appointment letter is scanned. The WBR section displays for each individual office and not for a selection of 'All' or 'Unassigned Devices' under the 'Office' dropdown on Device Assignment Detail. The page will reload and display this section after selecting an Office from the drop-down and clicking the Search button.
    a. When using the FACT WBR Mode to mark documents as Received or to check in Customers via the Appointment Letter, the Reception Log entry will be created with the information of the logged in Worker.

Page Fields:

- Office – Defaults to Unassigned Devices. Options include: All, Unassigned Devices, <list of all county offices>
- Device In Use dropdown – Allows user to filter the list by only the devices that are currently assigned a flow or are not assigned a flow. Options include: <blank>, Yes, No.
- Device Number – Value will be determined based on hardware when a new device is purchased and added to the list
- Device Name –Name assigned by the county to identify the device. Character limit of 100.
    - A validation message will be: "Device Name is too long [Max. length: 100 Characters]."
- Assigned Office – List of county offices.
- Device In Use – Indicates whether a device is currently assigned a flow.
- Receipt – Allows user to define text that should be printed at the end of the receipt. Users can enter a maximum of 100 characters. WBR Section Only.
    - A validation message will be: "Receipt is too long [Max. length: 100 Characters]."
- E-mail Worker – User can send e-mail notifications to the Workers attached to the appointment, only if an appointment letter is scanned. WBR Section Only.
- Message Worker – User can send Message Center notifications to workers only if an appointment letter is scanned. WBR Section Only.
- Device Number – Device number is a combination of the Serial Number and Device type the user has selected for the flow.
- Office – Office to which Receipt information is associated. WBR Section Only.

- Both Device Name and Office are required for the same row, however not all rows are required when saving the page.
    - A validation message will display when only the Device Name is entered or only the Assigned Office is selected. The message will be: "Device Name OR Assigned Office – Both Device Name and Assigned Office are required."

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Device Assignment**

2.1.5 Security Updates

The following Security Rights and Groups exist in LRS/CalSAWS and should be used:

- Kiosk Assignment
- Kiosk Flow Management
- Kiosk Flow Override
- Remote Kiosk Configuration

2.1.6 Page Mapping

PMCR for new page.

2.1.7 Page Usage/Data Volume Impacts

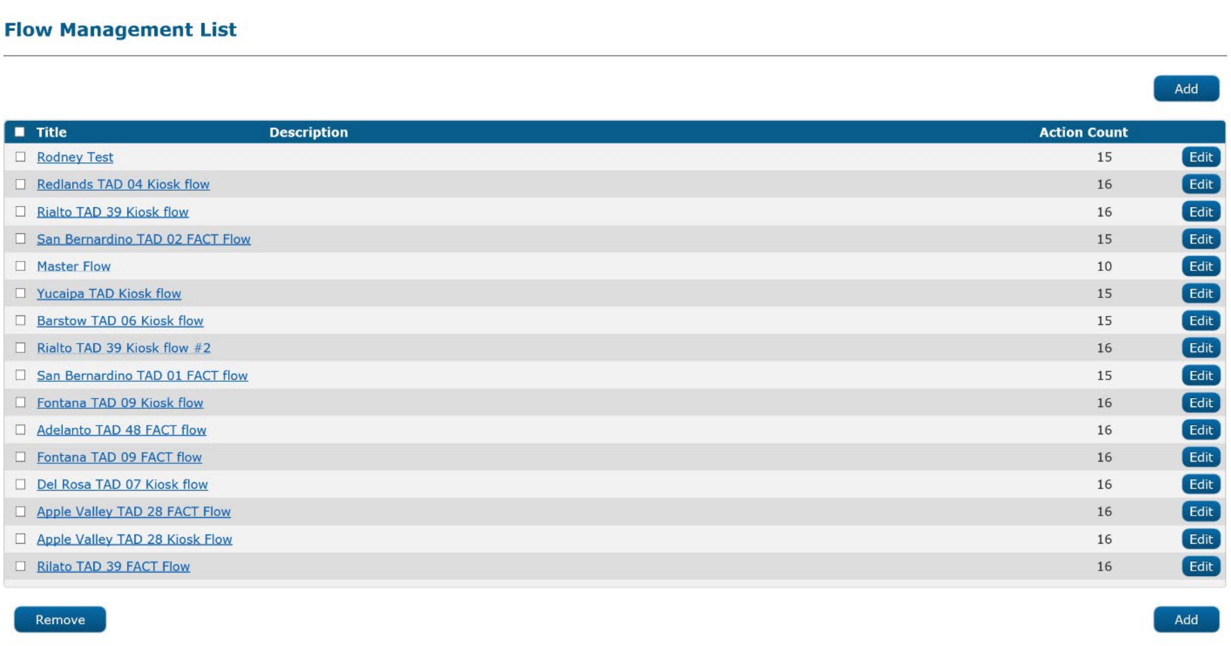
N/A

2.2 Flow Management List

2.2.1 Overview

Migrate the Flow Management List page. The Flow Management List page will be used to create new and access existing device flows for the county.

2.2.2 Flow Management List Mockup



Flow Management List

Add

Title	Description	Action Count	
Rodney Test		15	Edit
Redlands TAD 04 Kiosk flow		16	Edit
Rialto TAD 39 Kiosk flow		16	Edit
San Bernardino TAD 02 FACT Flow		15	Edit
Master Flow		10	Edit
Yucaipa TAD Kiosk flow		15	Edit
Barstow TAD 06 Kiosk flow		15	Edit
Rialto TAD 39 Kiosk flow #2		16	Edit
San Bernardino TAD 01 FACT flow		15	Edit
Fontana TAD 09 Kiosk flow		16	Edit
Adelanto TAD 48 FACT flow		16	Edit
Fontana TAD 09 FACT flow		16	Edit
Del Rosa TAD 07 Kiosk flow		16	Edit
Apple Valley TAD 28 FACT Flow		16	Edit
Apple Valley TAD 28 Kiosk Flow		16	Edit
Rilato TAD 39 FACT Flow		16	Edit

Remove Add

Figure 2.2.1 Flow Management List Mockup

2.2.3 Description of Change

1. Add the Flow Management List page. It will be accessed from the Global Navigation of Tools, Local Navigation of Office Admin and Lobby Management Task Navigation section - Device Flow Mgmt. and will open in a new sizable pop-up window.

Page Fields:

- Title – Populated from the Flow Management Detail page. Clicking the hyperlink accesses the detail page in view mode.
- Description – Populated from the Flow Management Detail page.
- Action Count – The total number of actions in the flow. The count will include all actions of type Custom, Appointment, and Document Upload.
- Edit button – Access the Flow Management Detail page in Edit Mode.
- Remove button - Removes the record.
- Add button – Adds a new record to access the Flow Management Detail page in Create Mode.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.2.5 Security Updates

The following Security Rights and Groups exist in LRS/CalSAWS and should be used:

- Kiosk Assignment
- Kiosk Flow Management
- Kiosk Flow Override
- Remote Kiosk Configuration

2.2.6 Page Mapping

PMCR for new page.

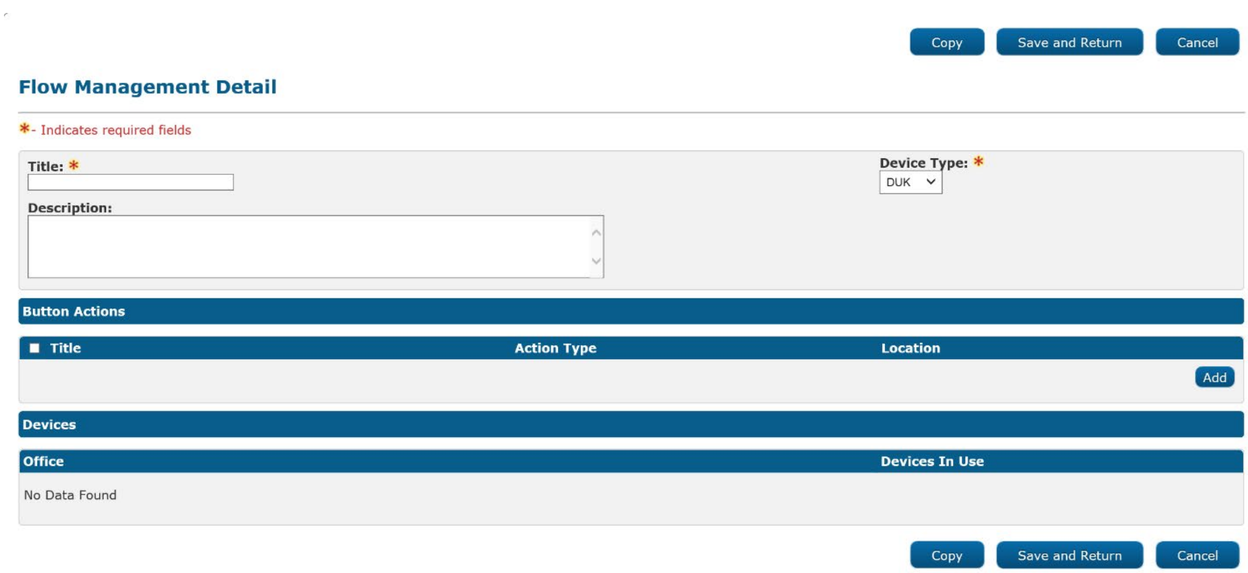
2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Flow Management Detail

2.3.1 Overview

The Flow Management Detail page will be used to set up the device flow. The user will be able to define a name and description of the flow, select the devices which will use this flow, and add actions to the flow.



2.3.2 Flow Management Detail Mockup

Figure 2.3.1a Flow Management Detail Mockup- Create Mode

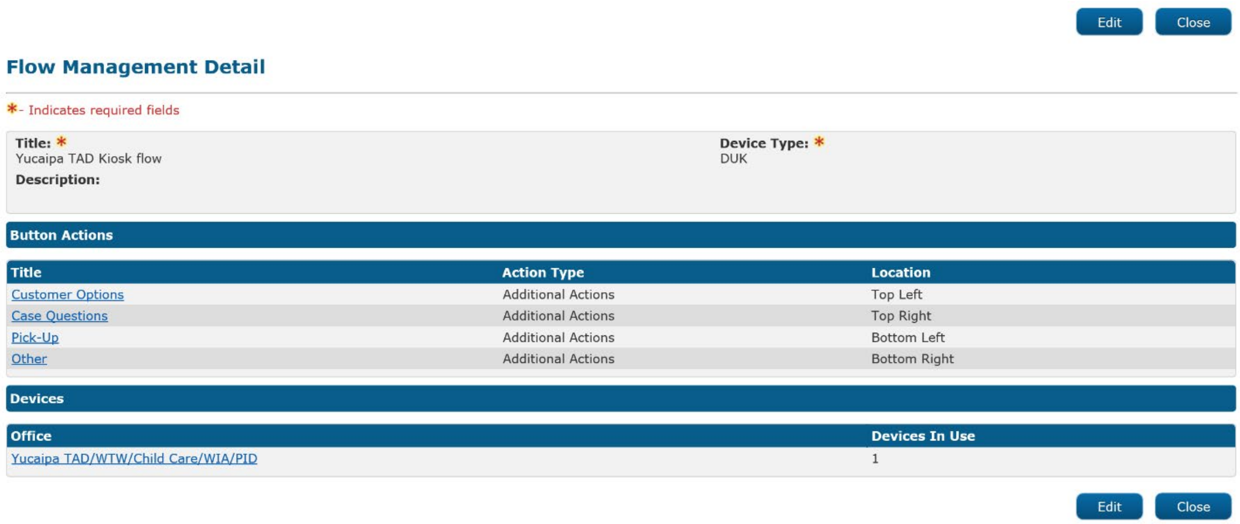


Figure 2.3.1b Flow Management Detail Mockup- View Mode

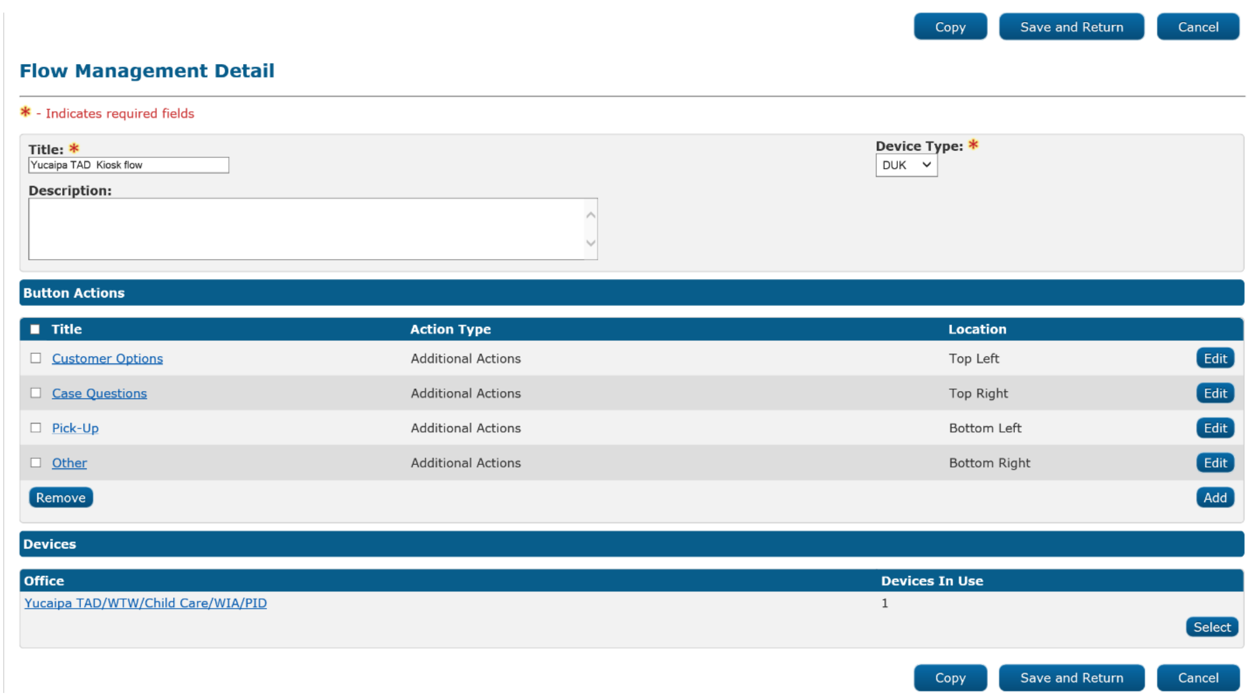


Figure 2.3.1c Flow Management Detail Mockup- Edit Mode

2.3.3 Description of Change

1. The Flow Management Detail page will be accessed by adding a new record from the Flow Management List page.
2. The user can either choose regular Document Upload Kiosk (DUK) or FACT. A user can now select device type for a flow on Flow Management Detail page. The available types are DUK and FACT.

Page Fields:

- Title – Name used for county to identify the flow. Character limit of 100.
- Device Type – This allows the user to define the type of device to be used for the flow. The available types are DUK and FACT. DUK is the default value. This is a required field.
  - o If a Device Type of FACT is selected, the action type of Document Upload will not be an option on the Action Detail page.
  - o Note: C-DUK exists in C-IV but is not a valid option and should be removed.
- Description – Character limit of 1000.
- Button Actions – Hyperlinks and buttons navigate to Action Detail page.
- Button Actions: Add button – Once four actions have been created for the flow, a validation message will display if the user tries to add an additional action.
  - o "Edit - Maximum number of actions is 4. Please edit an existing action."
- Button Actions: Location – The same location cannot be used on more than one action. A validation message will display if the user tries to save with multiple actions using the same location.
  - o "Edit – More than one action is in the same location. Please edit the location of an action."
- Devices: Select button – Navigates to Select Device for logged in user's office in edit mode.
- Save and Return button – If a flow has devices selected in multiple offices and the user made changes to the Button Actions, a validation message will display preventing the user from saving the changes. "Copy - This flow is being used in multiple offices. Please copy the flow to make changes."
- If the user has the override security group, the copy validation message will not display.
- If a Device Type of FACT is selected and if any button actions have an action type of Document Upload, a validation message will display as follows: "A flow of Device Type 'FACT' cannot contain a Button Action with an Action Type from 'Document Upload'."
- Copy button – The button actions on the page will be copied to a new Flow Management Detail page in create mode. The Title, Description, and Devices will not be copied and must be redefined. No changes on the previous Flow Management Detail page will be saved.

- Security Rights:
  - Kiosk Flow Override - allows user to save flow changes if the flow is used by kiosks in multiple offices.

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.3.5 Security Updates

N/A - Security rights are listed above.

2.3.6 Page Mapping

PMCR for new page.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Action Detail

2.4.1 Overview

The Action Detail page will be used to define what action will happen when the customer selects a button on the Kiosk or FACT. The Action Types display different fields based on the type that is selected. The default type for an Action Detail record is Custom.

2.4.2 Action Detail Mockup

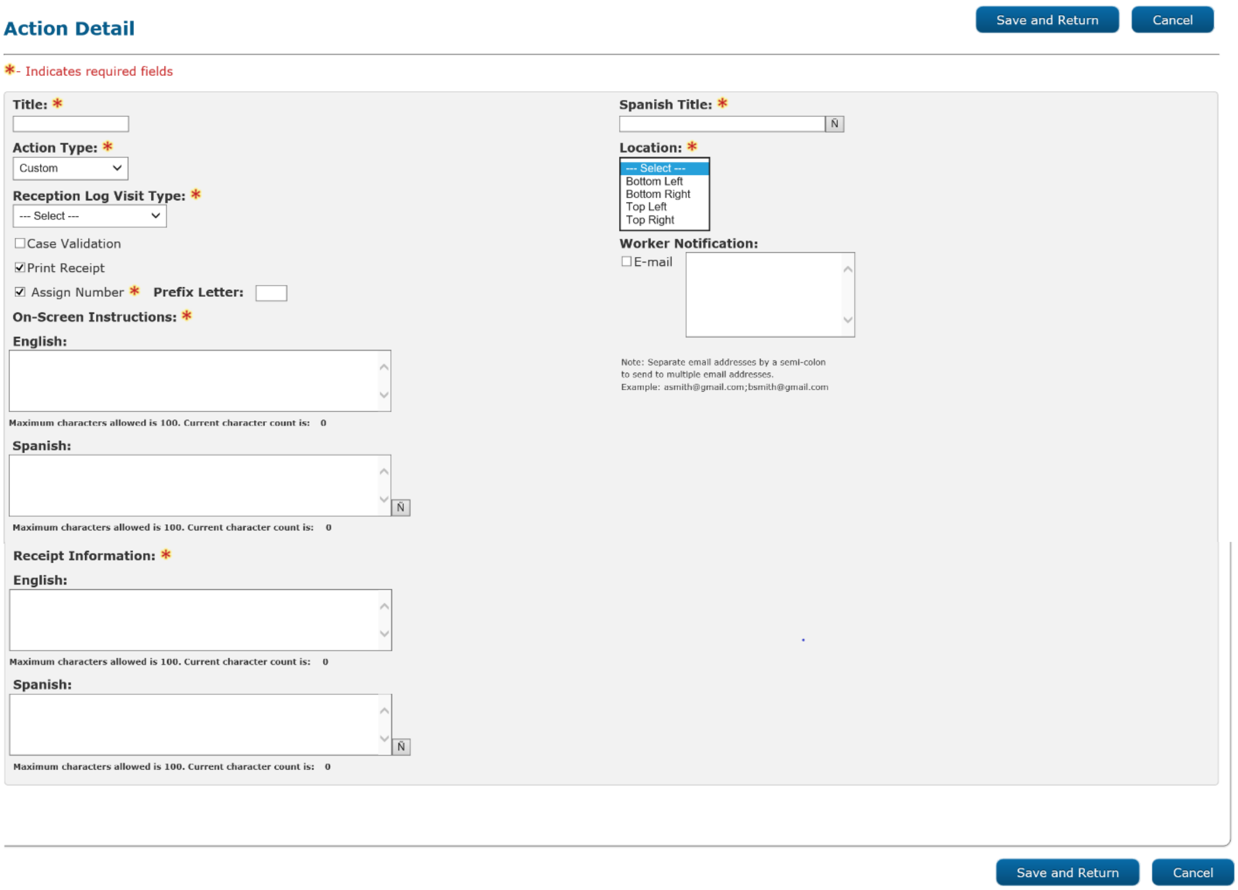


Figure 2.4.1a Action Detail Custom Action Type – Create Mode

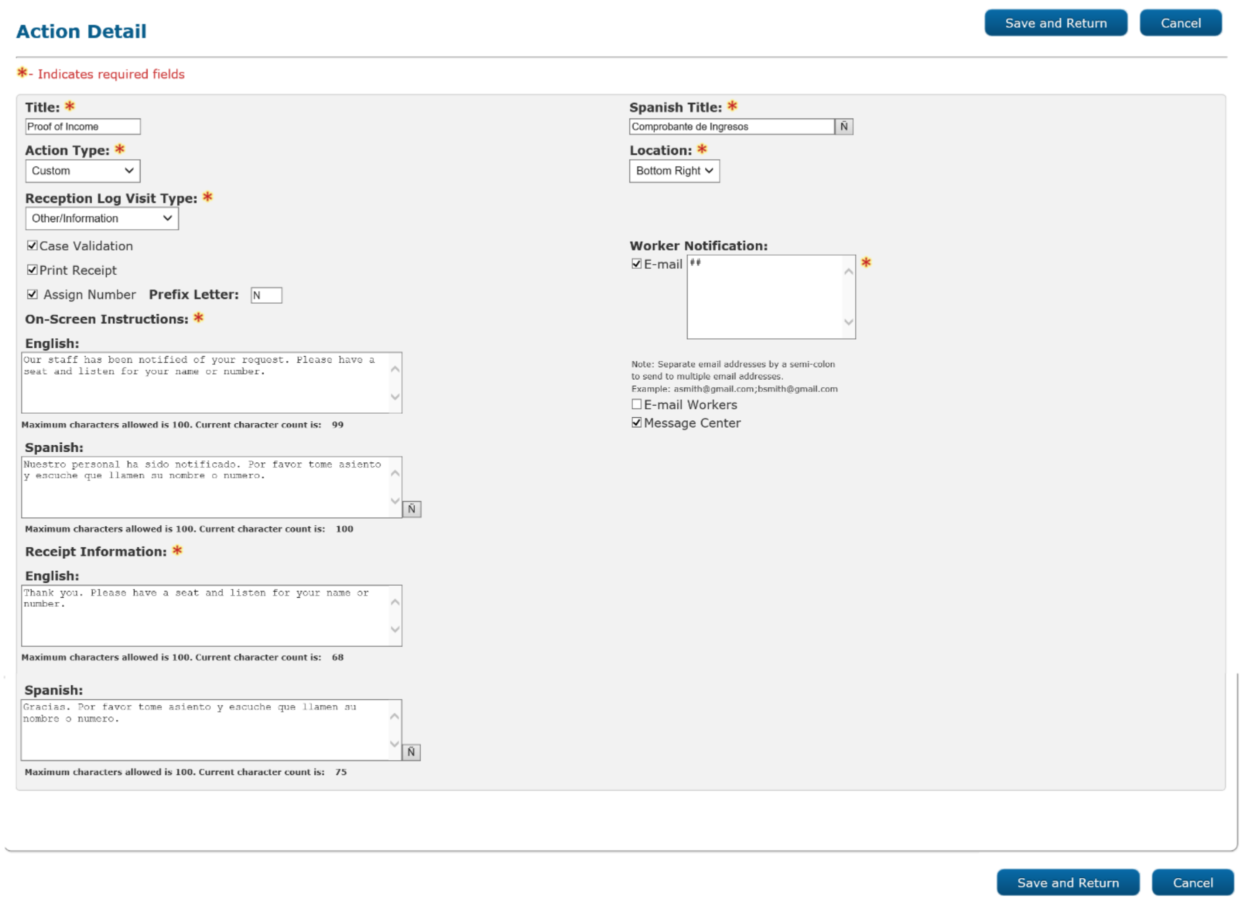


Figure 2.4.1b Action Detail Custom Action Type – Edit Mode

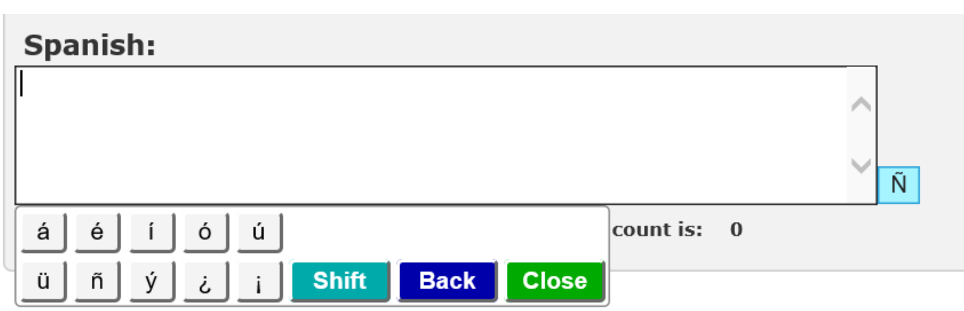


Figure 2.4.1c Action Detail Custom Action Type Spanish Keyboard

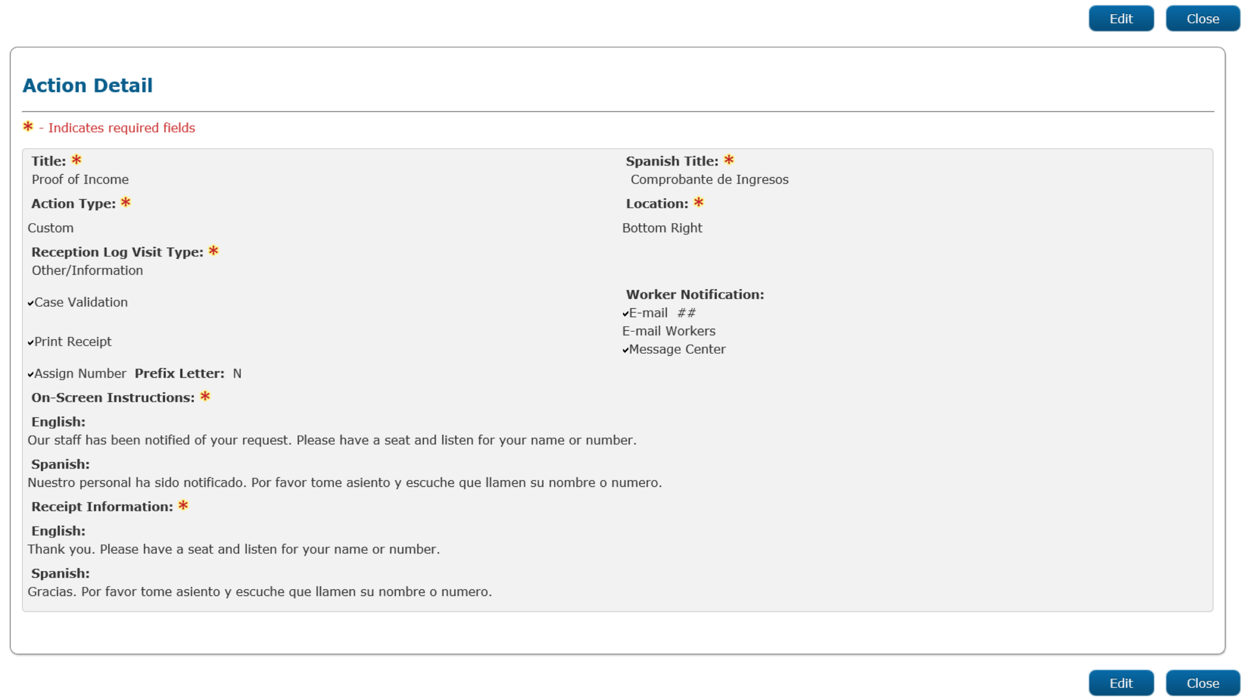


Figure 2.4.1c Action Detail Custom Action Type – View Mode

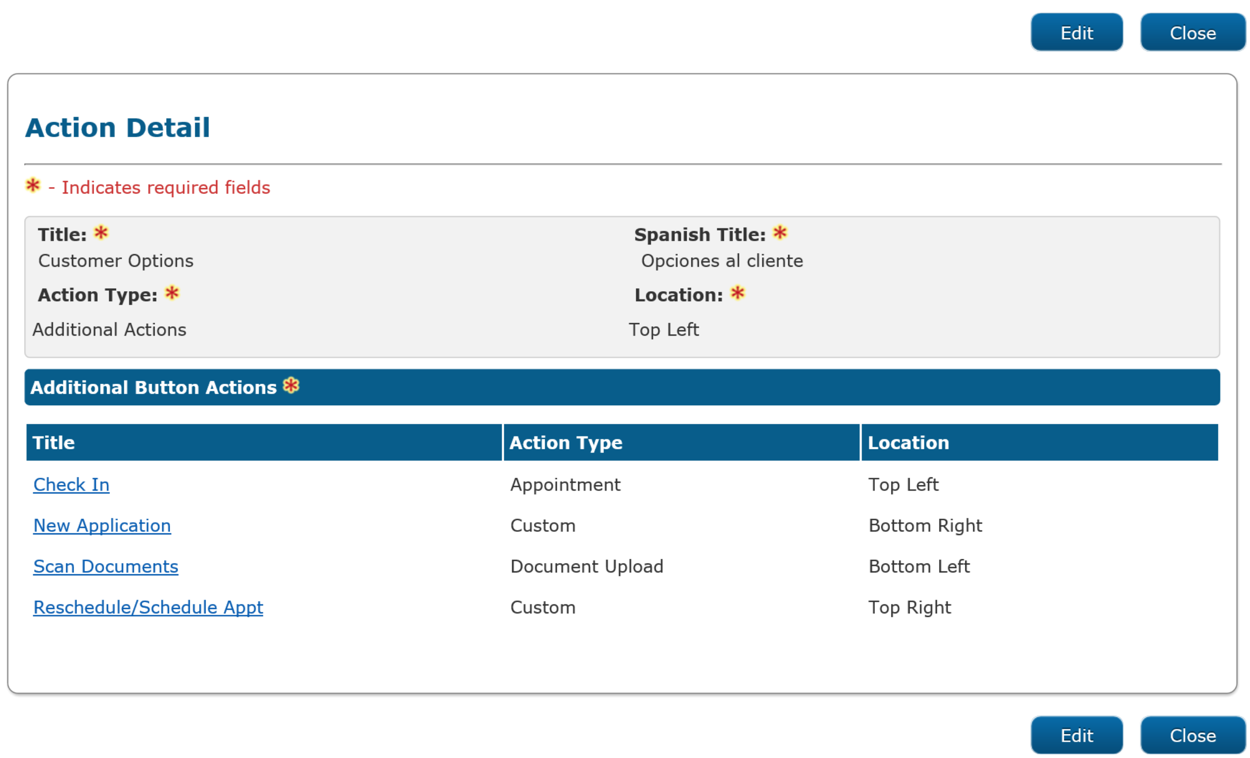


Figure 2.4.1d Action Detail Additional Button Actions – View Mode

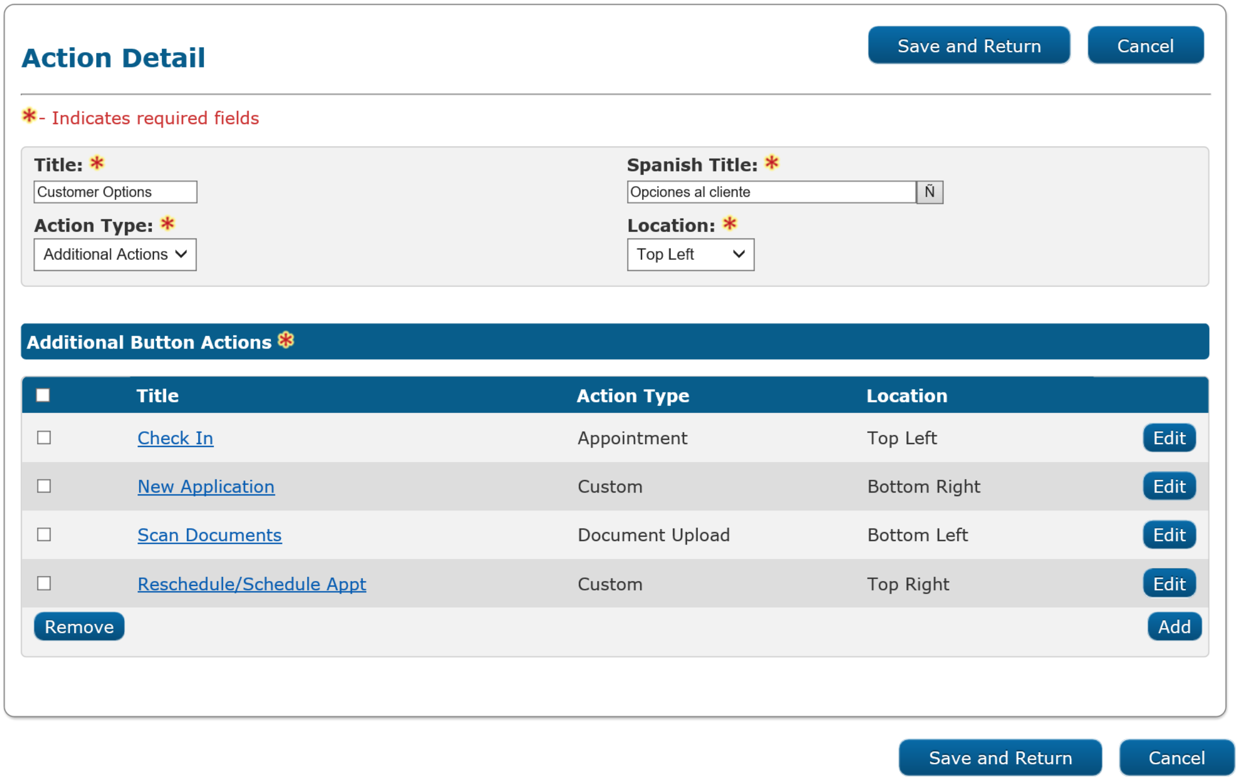


Figure 2.4.1e Action Detail Additional Button Actions – Edit Mode

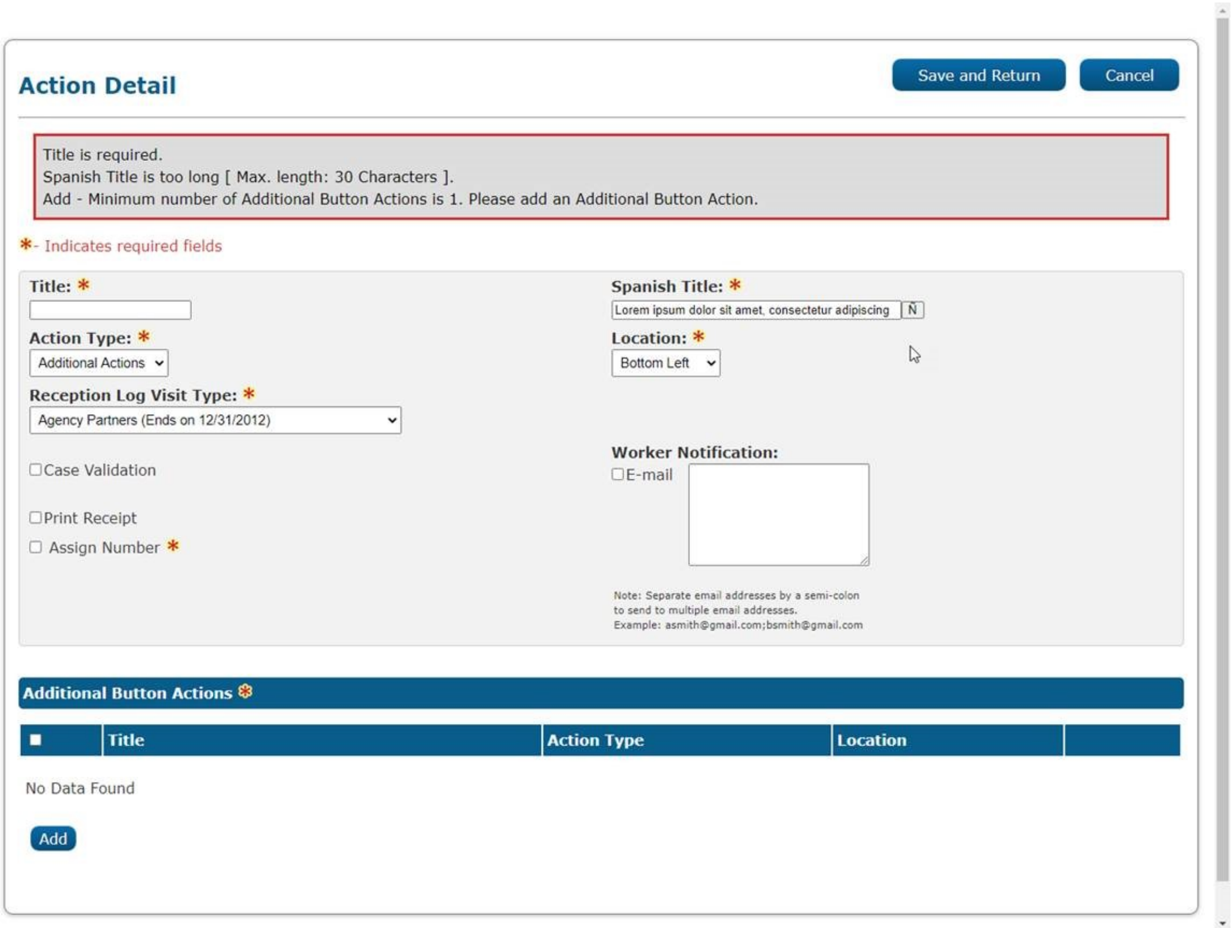


Figure 2.4.1f Action Detail Validation

2.4.3 Description of Change

1. The Custom Action Type will allow the user to select whether case validation is required, whether the customer will receive a receipt and what the receipt will state, and/or whether the customer receives an assigned number and prefix.
    a. Custom will be the default Action Type when a new Action Detail record is created.

2. The Appointment Action Type is a predefined action to be used for customers checking in for appointments. This includes requiring case validation, printing a receipt, and automatically sending a notification via the Message Center.
    a. Case Validation – Required, checkbox cannot be deselected.
    b. Worker Notification – If the user has Message Center security rights, Message Center is available. Counties can also include E-mail.
    c. Print Receipt – Required, checkbox cannot be deselected.

   d. Assign Number – Optional.
   e. Receipt Information – A receipt is required and will indicate the appointment they have checked in for. This will be the message that is printed on the receipt for the customer. Both English and Spanish text is required.

3. The Document Upload Action Type will allow the user to use the predefined action for customers uploading documents directly to their case. This includes requiring case validation and printing a receipt.
   a. The Document Upload Action Type is not available when a device type of FACT has been selected.
   b. Case Validation – Required, checkbox cannot be deselected.
   c. Print Receipt – Required, checkbox cannot be deselected.
   d. The On-Screen Instructions text is not an option. The screens are predefined.
   e. If the document being scanned is a barcoded document, the document will be marked as received on the case.
   f. The Reception Log entry created will automatically have a Completed status after Waiting.

4. The Additional Actions Action Type will allow the user to define up to four more actions the customer can choose from. These actions can include the Custom, Appointment, and Document Upload action types.
   a. The Action Type "Additional Actions" will not be available for additional button actions
5. On the Action Detail page in View Mode as seen in Figure 2.4.1c Action Detail Custom Action Type – View Mode align the text fields with the label fields to be consistent.

Page Fields:

- Title – This is the button label that will display on the Kiosk "How can I help you?" screen. Both the English and Spanish labels are required.
  - An additional button labeled Ñ will display for Spanish textboxes. This will open a button selection for Spanish characters.
  - The character limit of each label is 30 characters..
- Location – This is the location of the action on the Action Selection Kiosk screen. The available options are: Top Left, Top Right, Bottom Left, and Bottom Right.
- Reception Log Visit Type – The list of Visit Types displayed on the Reception Log Detail page. The selected Visit Type will be used for the Reception Log visit entries created by the Kiosk.
- Case Validation – The customer will be required to enter their case number or swipe their EBT/BIC card. The case information will be used when the Reception Log entry is created.

- Worker Notification – E-mail with text box that supports multiple email addresses will display after the checkbox. User must select the checkbox and enter the e-mail addresses separated by semi-colons. If Case Validation is selected, the E-mail Workers and Message Center checkboxes will display. A notification will automatically be sent to the assigned workers of the case.
    - Limit of characters for this field is 500. The following validation message will display: "Worker Notification is too long [Max. length: 500 Characters]."

- Print Receipt – The customer will receive a receipt from the Kiosk when the action is complete.
- Assign Number – The customer will receive an auto generated assignment number from the kiosk when the action is complete.
    - Each office will use the same sequence and it will be reset each night.
- Prefix Letter – If the Assign Number is selected, the Prefix Letter field will display. The assignment number will be listed with a letter prefix, i.e. B24. The same prefix letter will be used each time the action is performed.
- On-Screen Instructions – This will be the message that displays on the Kiosk "On Screen Instructions" screen. Both English and Spanish text is required.
    - The character limit of each textbox is 100 characters. A countdown of used characters will appear under each description field.
- Receipt Information – If Print Receipt is selected, this section will display. This will be the message that is printed on the receipt for the customer. Both English and Spanish text is required.
    - The character limit of each textbox is 100 characters. A countdown of used characters will appear under each description field.
- If Case Validation is not selected, Assign Number is required.

2.4.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.4.5 Security Updates

N/A - Security rights are listed above.

2.4.6 Page Mapping

PMCR for new page.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Select Device

2.5.1 Overview

The Select Device page will allow the user to select the devices from their office for the flow being defined.

2.5.2 Select Device Mockup

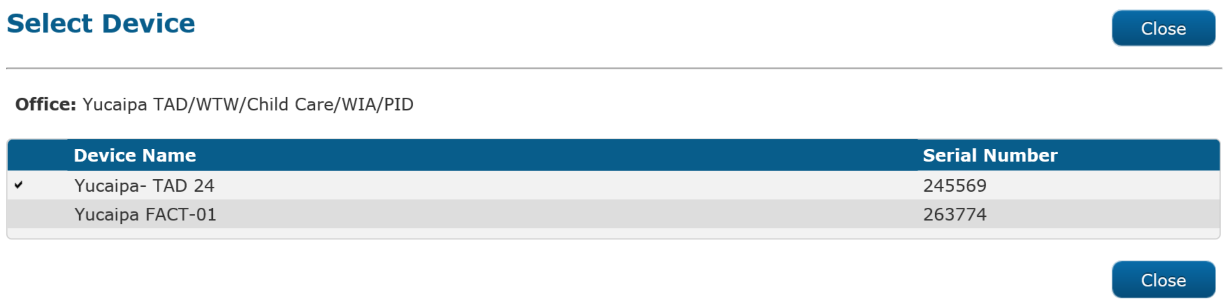


Figure 2.5.1a Select Device View Mode

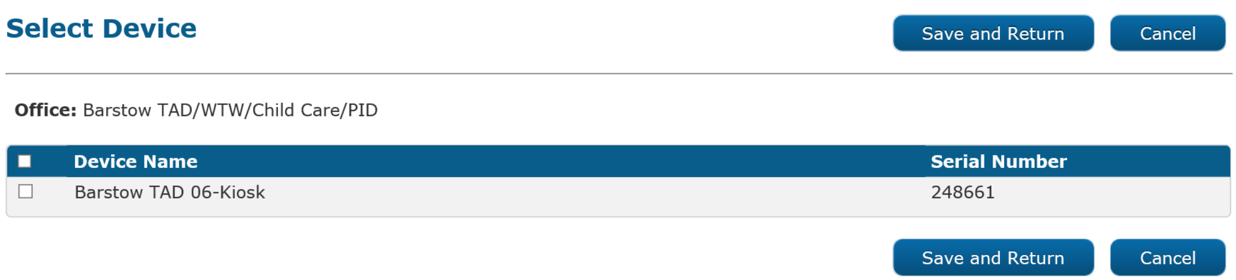


Figure 2.5.1b Select Device Edit Mode

2.5.3 Description of Change

1. The Select Device page is accessed from the Flow Management Detail page by clicking on the Select button to access the page in Edit Mode or Office name to access the page in View Mode under the Devices section.
2. View Mode – Displays the devices for the viewed office with read-only checkmarks for the devices in use.
   a. "Close" button navigates the user back to Flow Management Detail

3. Edit Mode – Displays the devices for the logged in user's office. The user can select the available devices on the page.

2.5.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management Dropdown > Flow Mgmt. List**

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

N/A

2.5.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1024	The CONTRACTOR shall migrate the Device Assignment Detail page.	**Original:** The "Device Assignment" page that exists in C-IV at the time the existing C-IV functionality for the page is migrated will also be ported into CalSAWS. - There will be minimal effort to migrate in the C-IV Kiosk and Lobby Web Services build as the only anticipated impact is the LRS data model changes in the web services. **Revised:**	Added the Device Assignment Detail page.
1025	**Original:** The CONTRACTOR shall migrate the Device Flow Mgmt. task navigation and the child pages of Flow Management List page and Flow Management Detail page. **Revised:** The CONTRACTOR shall migrate the Device Flow Mgmt. task navigation, Flow Management List, Flow Management Detail, and related child pages.	**Original:** The "Device Flow Mgmt." page that exists in C-IV at the time the existing C-IV functionality for the page is migrated will also be ported into the CalSAWS. **Revised:**	Add the Device Flow Mgmt. pages.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207409 | DDID 1005

Update Office Public Hours of Operation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Munce, Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/03/2019	1.0	Initial draft of Online changes	Brian Munce
06/27/2019	1.1	Added Customer Appointment Detail	Brian Munce
8/12/2019	1.2	Added batch changes	Avi Bandaranayake
08/14/2019	1.3	Added Correspondence recommendations	Brian Furlong
06/22/2020	1.4	Updated to include Correspondence Office Hours section and removed Correspondence recommendations.	Melissa Mendoza
07/27/2020	1.5	Updated Assumption #2 per CalSAWS DEL 37 Comments Log	Jasmine Chen
08/25/2020	2.0	Content Revision. Highlighted changes in the document.	Melissa Mendoza

Table of Contents

1 OVERVIEW

This SCR facilitates setting varying office hours for individual days of the week, and updates existing functionalities that depend on office hours to support the new format.

1.1 Current Design

The Office Detail page specifies the start time and end time for Public Hours of Operation for each office.

1.2 Requests

Per DDID 1005, update the Office Detail page so that Public Hours of Operation can vary based on the day of the week.

1.3 Overview of Recommendations

1. Update the Office Detail page with a new table section that allows each office to specify the start and end time for Public Hours of Operation with a row for each day of the week.
2. Update the Customer Appointment Detail page to use the revised hours when clicking the Suggest Time(s) button.

1.4 Assumptions

1. The current functionality allows the user only to select times in 15 minute increments. This will remain unchanged.
2. The existing office hours section on the Office Detail page will be relabeled Correspondence Office Hours so that the following existing forms/notices that have Office Hours prepopulated will not be impacted.
    - CW 215 – Notification of Intercounty Transfer
    - MC 216 – Medi-Cal Renewal Form
    - MC_NOA_LETTER_TEMPLATE - Hunt v Kizer notice generated through EDBC.
    - CW_CF_NOA_LETTER_TEMPLATE - CW 10 generated through EDBC
    - Q_NOA_TEMPLATE - MSP NOA Template
    - H_STATIC_FOOTER - MAGI footer that generates on MAGI NOAs
3. YBN and IVR will not be impacted with this design and will continue to use the Correspondence Office Hours until the completion of the Self-Service Portal and IVR solution is in place for all 58 counties.

2 RECOMMENDATIONS

2.1 Office Detail

2.1.1 Overview

Update the layout of the Public Hours of Operation section of the Office Detail page to enable selecting specific Start and End Times for each day of the week.

2.1.2 Office Detail Mockup

in general the assignment batches were 'migrated' or made available for all countues

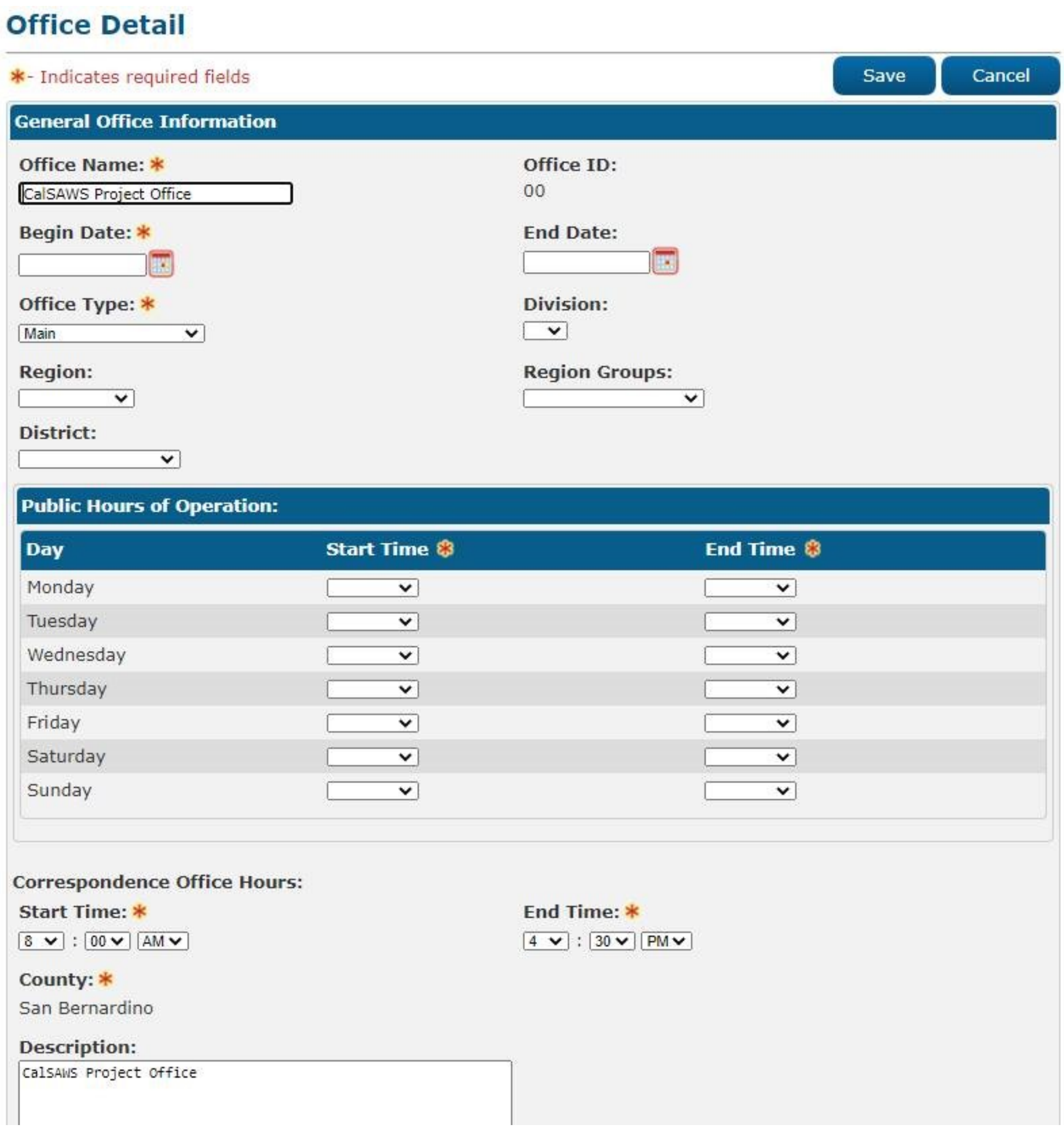


Figure 2.1.2 – Office Detail

2.1.3 Description of Changes

1. Move the "Public Hours of Operation" label of the Office Detail page.
    a. Create a new table section titled "Public Hours of Operation" on the page.
        i. The column headers will be "Day", "Start Time", and "End Time".
        ii. Each row will be labeled with a different Day, beginning with Monday then proceeding consecutively to the following days of the week and ending with Sunday.
        iii. The Start Time and End Time columns will contain select menus with options available beginning with "12:00 AM" and then proceeding through the day at 15-minute increments (i.e. "12:15 AM", "12:30 AM", …), ending at 11:45 PM as the last available time.
        iv. Update the existing validation on the Start Time field that requires the Start Time to be earlier than or equal to the End Time for the modified Start Time and End Time fields. The message will remain the same (no functional impact).
        v. Monday-Friday will be required, and Saturday and Sunday will be optional. Required validation will display for Monday through Friday if the fields are not completed. If a start/end time is filled out for Saturday or Sunday the start/end time is required.
    b. Relocate the existing "County" field to a new row between the new "Public Hours of Operation" table and the existing "Description" field.
2. Replace the existing label Public Hours of Operation with Correspondence Office Hours. This will be used to populate existing forms in the system that use the current office hours format.
    a. The label is changing but the table values should remain so that correspondence is not impacted by this change.

2.1.4 Page Location

Global: Admin Tools

Local: Office Admin

Task: Office

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update the page mappings to include new fields and relabeled field.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Customer Appointment Detail

2.2.1 Overview

Update the functionality to suggest times for an appointment to accommodate the new structure for office hours.

2.2.2 Customer Appointment Detail Mockup

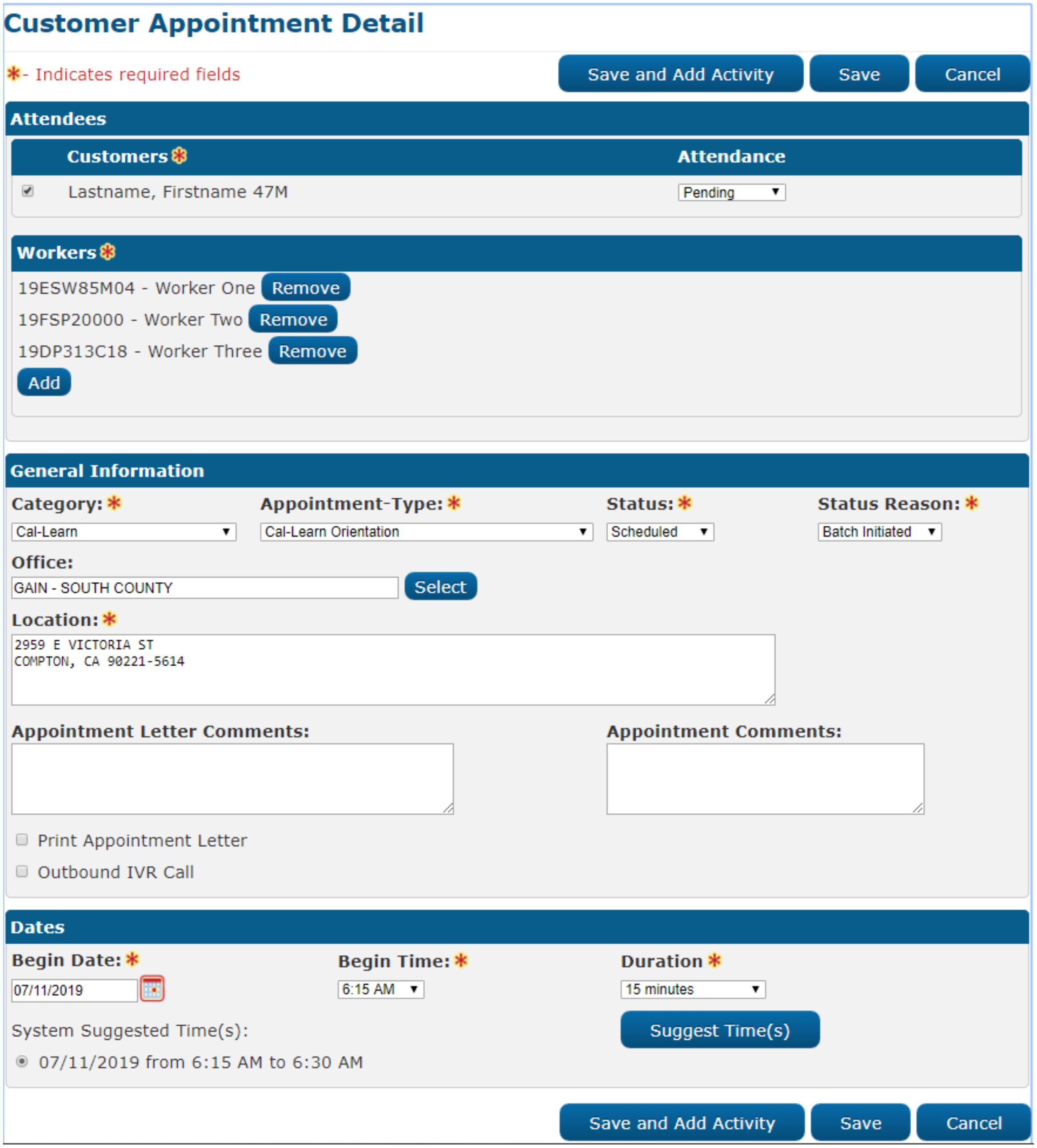


Figure 2.2.2 – Customer Appointment Detail

2.2.3 Description of Changes

1. Update the implementation for the Suggest Time(s) button. Times will now be suggested based on the provided parameters and the office hours that are set for the specific day of the week that the specified Begin Date falls on.

2.2.4 Page Location

Global: Eligibility

Local: Customer Schedule

Task: Appointments

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

Usage of this button would be expected to remain the same, so there should be no change in page usage. The Suggest Time(s) button only reads from the database, so there is also no impact to data volume.

2.3 Batch Appointment Jobs

2.3.1 Overview

Update batch appointment jobs that currently use a single start time and end time for a given office to utilize the hours per day as specified on the Office Detail page.

2.3.2 Description of Change

Modify the following batch jobs to accommodate the change to the office hours data structure.

Job Number	Short Description
JBXXC898D	NonCompliance Appointment Batch
JBXXC899D	Assign Next Activity Appointments Batch
PBXXC902	CW/CF Recertificationi Job Day-1
PBXXC903	SSIAdvocacyMandatoryAppointmentsBatch
PBXXC904	Second SSIAppointmentsBatch
PBXXC905	GCMAppointmentsBatch
PBXXC906	SsiapNsaAppointmentsBatch

Job Number	Short Description
PBXXC909	CW/CF Recertificationi Job Day-2
PBXXM115	Pending unassigned pool appraisal batch

Technical Note:

Any reference to the old data model using a single HR_OF_OP_START_TIME and HR_OF_OP_END_TIME will need to be replaced with the new data model for the batch jobs listed above.

2.3.3 Execution Frequency

No change

2.3.4 Key Scheduling Dependencies

No change

2.3.5 Counties Impacted

All counties

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

No change

2.4 Data Change – Office Detail

2.4.1 Overview

Update the new table using the existing office hours that are in the system for Los Angeles County.

2.4.2 Description of Change

1. Run a Data Change to update the days of the week to Monday-Friday using the current begin and end time for each office. Offices will need to update weekend hours manually if necessary.

2.4.3 Estimated Number of Records Impacted/Performance

Existing Offices for LA County: 390 records.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1005	The CONTRACTOR shall update the Public Hours of Operation Start Time and End Time fields to display for each day of the week on the Office Detail page.		The Public Hours of Operation Start Time and End Time fields are expanded into a new section with both fields available for each day of the week.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-213493 | DDID 1052, 1092, 1094, 1095, 1096

Updates to Fiscal Authorization

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Eric Wu
	Reviewed By	S. Garg, J. Chavata, K. Santosh, N. Barsagade, J. Besa, E. Chu, Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/18/2020	1.0	Initial Draft	Eric Wu
07/28/2020	1.1	Update based on QA team's comments	Eric Wu
08/04/2020	1.2	Update to maintain 3rd Level Authorization functionality for L.A. county. Also changes column names based on Build team requested	Eric Wu
08/06/2020	1.3	Update Column Name based on DBCR	Eric Wu
08/20/2020	1.4	Content Revision 1 Add 'Close' button on Authorization List page	Eric Wu

Table of Contents

1 OVERVIEW

1.1 Current Design

Payments/Valuables are distributed to customers according to their needs established through the system. Payment/Valuable requests are required to be reviewed by workers, 1st Level Approver ('Supervisor' in Los Angeles County), and/or 2nd Level Approver ('Deputy' in Los Angeles County) before benefits are issued to customers. Based on customers' need types, requests can go through one of the following Authorization processes:

1. Worker authorization only
2. Worker and 1st Level authorization.
3. Worker, 1st Level authorization, and 2nd Level Authorization.

Approvers utilize the Pending Authorizations page to review payment/valuable requests that are pending approval.

Currently, there are no functionalities in the system that allow counties to manage the authorization process of Payment/Valuable requests.

1.2 Requests

1. Update Supervisor Authorization types of Payment/Valuable requests to be configurable by each county.

1.3 Overview of Recommendations

1. Update County Authorizations page to allow users to manage authorizations of Payment/Valuable requests by programs.
2. Add Payment/Valuable Request Authorization and Payment/Valuable Request Authorization Detail pages to allow specified county admin users to configure authorizations for each program.
3. Default values for Los Angeles County to maintain their current authorization process and for the 57 Migration counties to have 1st Level Authorization.

1.4 Assumptions

1. The relationship of programs, customer need categories, and customer need types will continue to be managed with Category 1870.
2. This SCR does not affect the functionality of allowing the same worker to create and approve a Payment Request. For counties that opt in to 'Same User Payment Request Approval', the user who creates a payment request can also approve it.
3. Existing supervisor authorization task generation will remain unchanged.
4. This new logic will be applied to ongoing Payment/Valuable Requests only.
5. General Assistance (Managed) will not be available when this SCR is implemented for 20.11. A DCR will be included to default GM to 1st Level Authorization in SCR 'CA-201377 DDCR 10002: GA/GR Solution for C-IV Counties' for 21.01'.

6. CalWIN's General Assistance/ General Relief will be excluded from this SCR as it is not currently in the LRS/CalSAWS. A DCR will be included to default the program to 1st Level Authorization in SCR CA-215914 DDID 2313 FDS: GA GR Employment Services Phase 2.
7. Audit Trail functionality will be implemented with SCR CA-217634.
8. For 57 Migration Counties, the default authorization will be 1st level authorization as this is a required level for Payment/Valuable Requests. Counties that wish to have the same worker create and authorize the request can add the relevant security rights to the user's profile to do so.

2 RECOMMENDATIONS

2.1 County Authorizations

2.1.1 Overview

The County Authorizations page is used to configure supervisor authorizations as appropriate for each county.

Add a new section under Fiscal for each county to configure the authorization levels for Payment/Valuable Requests.

2.1.2 County Authorizations – Fiscal Mockup

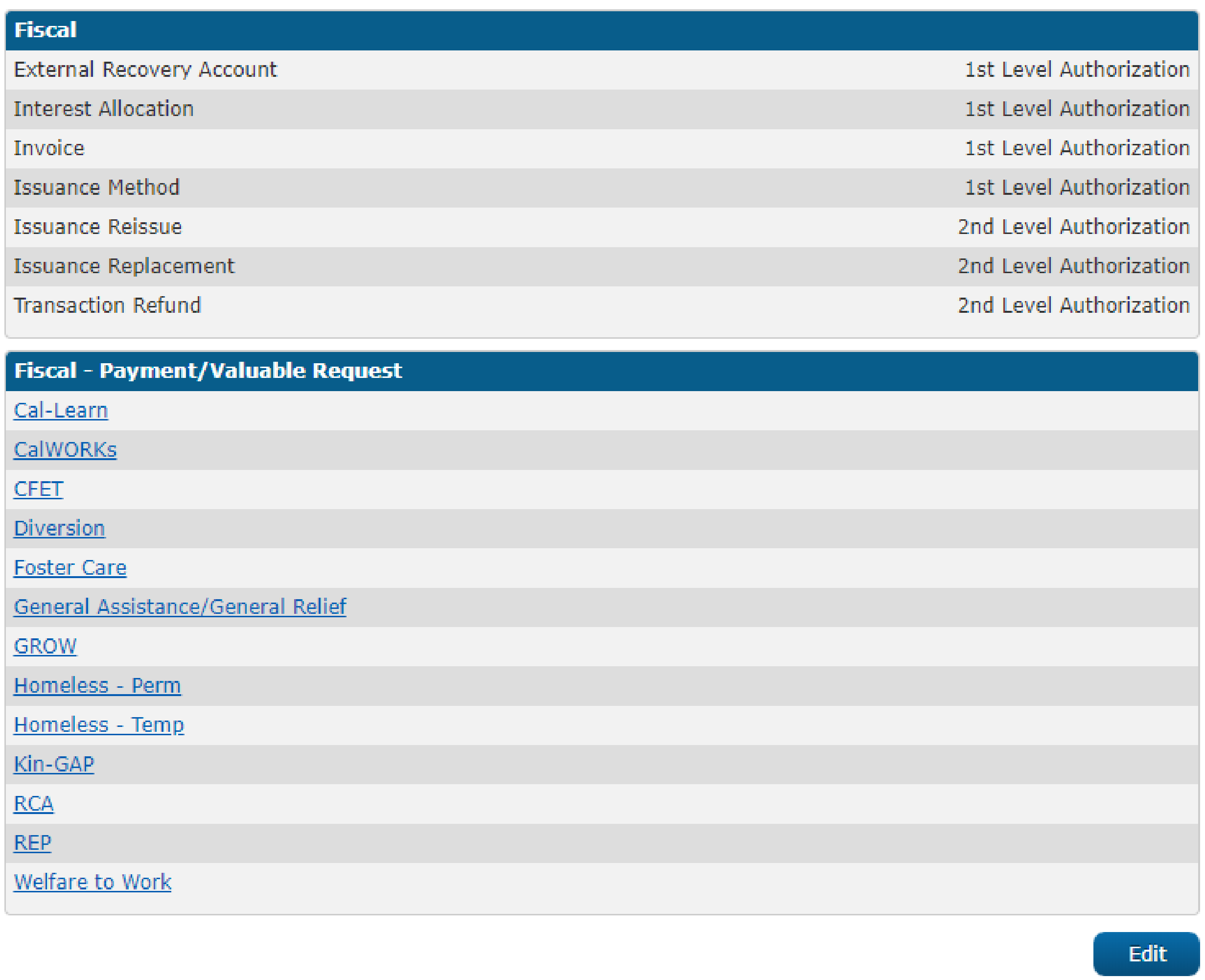


Figure 2.1.1 – Fiscal – Payment/Valuable Request in View Mode for Los Angeles County

Fiscal - Payment/Valuable Request
Cal-Learn
CalWORKs
CFET
Diversion
Foster Care
General Assistance/General Relief
GROW
Homeless - Perm
Homeless - Temp
Kin-GAP
RCA
REP
Welfare to Work

Figure 2.1.2 – Fiscal – Payment/Valuable Request on County Authorizations page in Edit Mode for Los Angeles County

2.1.3 Description of Changes

1. Add a new 'Fiscal – Payment/Valuable Request' section under 'Fiscal'. This section will display all programs available for service arrangements for each county. Each program will be a hyperlink which navigates users to the Payment/Valuable Request Authorization List page (section 2.2) in View Mode and will be text only in Edit Mode.

2.1.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.1.5 Security Updates

No changes

2.1.6 Page Mapping

Fiscal – Payment/Valuable Request: 18 – Programs for counties to configure supervisor authorizations of Payment Requests and Valuable Requests.

2.1.7 Page Usage/Data Volume Impacts

None

2.2 Payment/Valuable Request Authorization List – [Program]

2.2.1 Overview

This new page will allow county users with the appropriate security to view and configure the level of authorization required for Payment/Valuable Requests of a program.

2.2.2 Payment/Valuable Request Authorization List Mockup

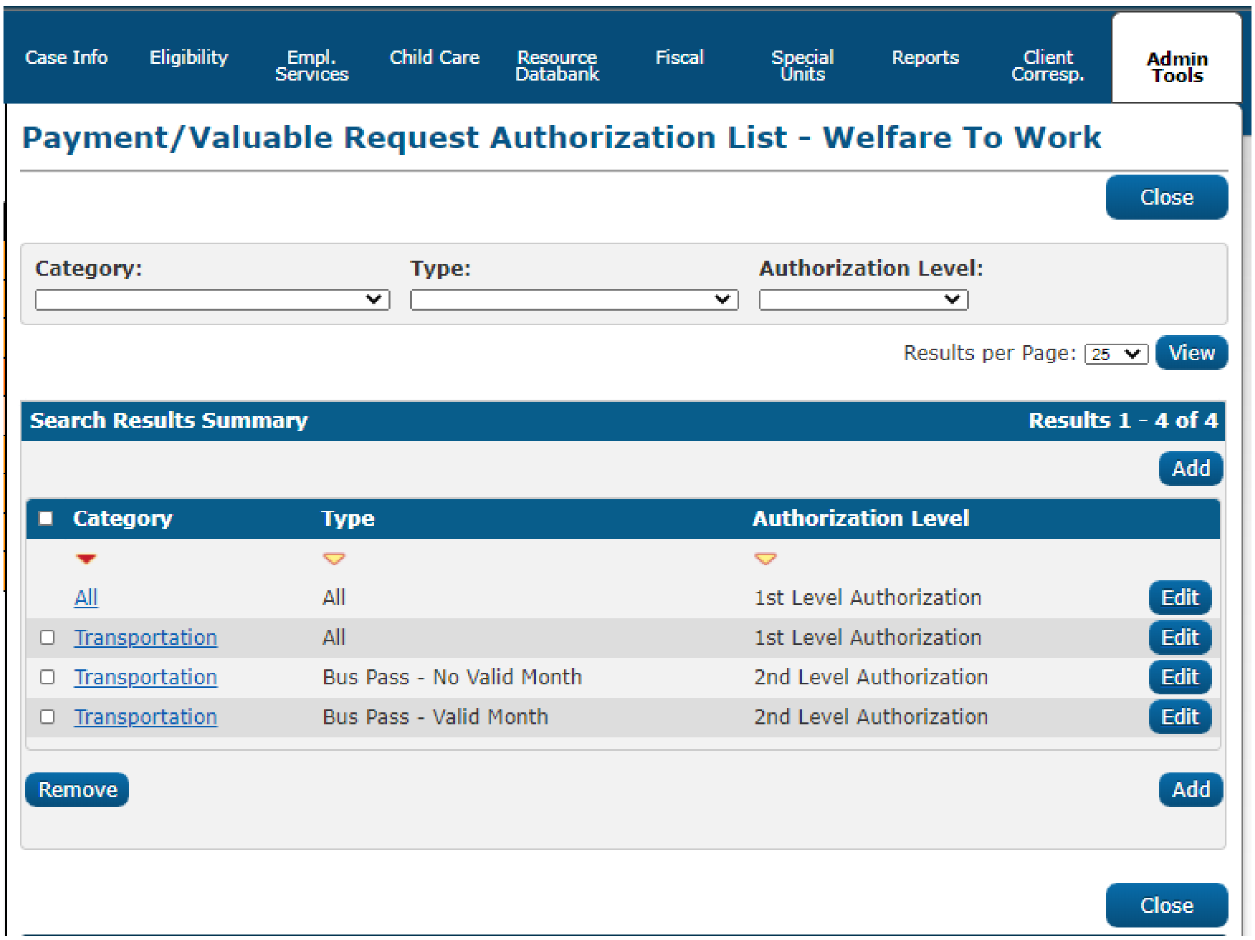


Figure 2.2.1 – Payment/Valuable Request Authorization List

2.2.3 Description of Changes

1. Add a new Payment/Valuable Request Authorization List page – see figure 2.2.1. Users with 'CountyAuthorizationView' security right can navigate to this page from County Authorizations (section 2.1).
   a. The header format will be 'Payment/Valuable Request Authorization List – [Program]'.
   b. A search section will allow users to filter the results by clicking the 'View' button.

    i. Category – A dropdown field will contain an 'All' option and Need Categories available for the program. The default value is blank.
    ii. Type – A dropdown field will contain an 'All' option and Need Types available for the program. The default value is blank.
    iii. Authorization Level – A dropdown field will have 1st Level and 2nd Level Authorizations as selectable options. The default value is blank.
    iv. Results per Page – A dropdown field to set how many records to display per page after clicking 'Search' button. Options are 25, 50, 75, and 100. The default value is 25.

c. A 'Search Results Summary' section with paginations and following fields:
    i. Check Box – This field will allow users to remove a Payment/Valuable Request Authorization Detail record. It will be visible for users with 'CountyAuthorizationEdit' security right. This check box will not be visible for authorization detail on the program level.
    Note: Program Level Authorization Detail, which has Category 'All' and Type 'All', of existing programs will be created by the DCR in section 2.4. When implementing a new Program in future, it is recommended to set the program level authorization with a DCR.
    ii. Category – The field will indicate the need category of a Payment/Valuable Request Authorization Detail record. It will be a hyperlink and navigate users to Payment/Valuable Request Authorization Detail in View Mode (section 2.3).
    iii. Type – The field will indicate the need type of a Payment/Valuable Request Authorization Detail record
    iv. Authorization Level – The field will indicate the authorization setting for specified Category and Type.
    v. Edit - This button will be visible for users with 'CountyAuthorizationEdit' security right and navigate users to Payment/Valuable Request Authorization Detail in Edit Mode (section 2.3).
    vi. Search results will be paginated.
    vii. All columns are sortable.
    viii. The default sort will be Category, and the order will begin with Category 'All' and is followed by the rest in alphabetical order. Within the same categories, the order will begin with Type 'All' and is followed by the rest types in alphabetical order.

d. Close – This button will be only available in View mode and navigate users to County Authorizations page.

e. Remove - This button will allow users to delete Payment/Valuable Request Authorization record. This button will be visible when following conditions are met:
    i. There are any Payment/Valuable Request Authorization Details with a checkbox in the search results section.
    ii. Users have 'CountyAuthorizationEdit' security right.
f. Add - This button navigates users to the Payment/Valuable Request Authorization Detail in Create Mode (section 2.3), and will be visible when the following conditions are met:
    i. There are Customer Needs and Types set up for the program.
    ii. Users have 'CountyAuthorizationEdit' security right.

2.2.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations.	County Authorization View County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations.	County Authorization Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Authorization View	Gives the User the ability to view County Authorizations.	County Discretion
County Authorization Edit	Gives the User the ability to edit County Authorizations.	County Discretion

2.2.6 Page Mapping

Add page mapping for the Payment/Valuable Request Authorization List page.

2.2.7 Page Usage/Data Volume Impacts

None.

2.3 Payment/Valuable Request Authorization Detail – [Program]

2.3.1 Overview

The new page will allow county users with the appropriate security to view and configure authorization levels for the specific program, need category, and need type. Also, users can set conditions/requirements for 2nd Level Authorization.

History of the changes to Payment/Valuable Request Authorization Detail will not be tracked.

2.3.2 Payment/Valuable Request Authorization Detail Mockup

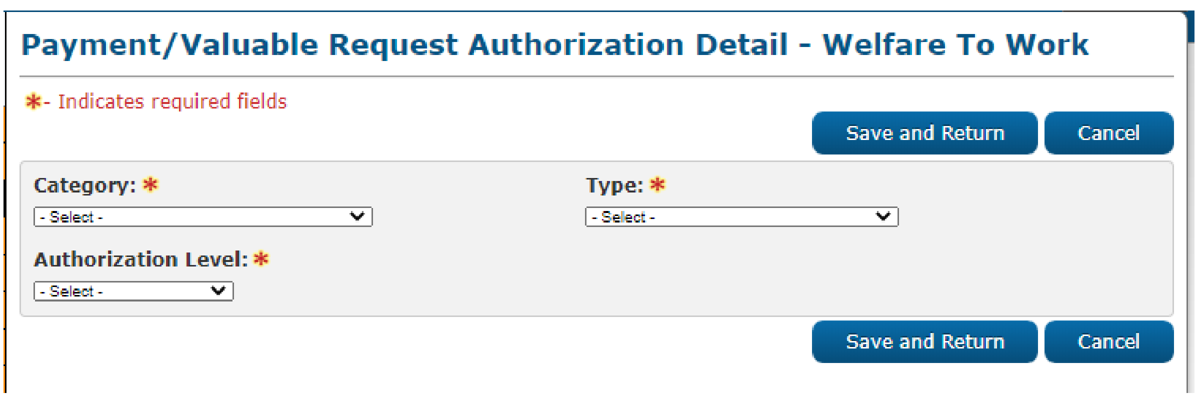


Figure 2.3.1 – Create Mode

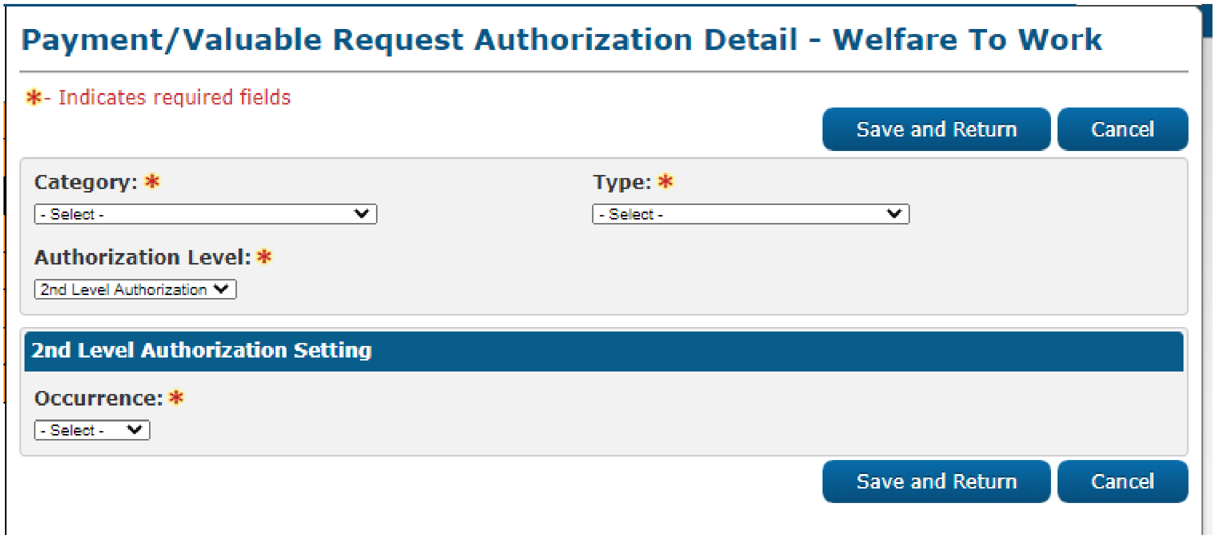


Figure 2.3.2 – Create Mode with 2nd Level Authorization

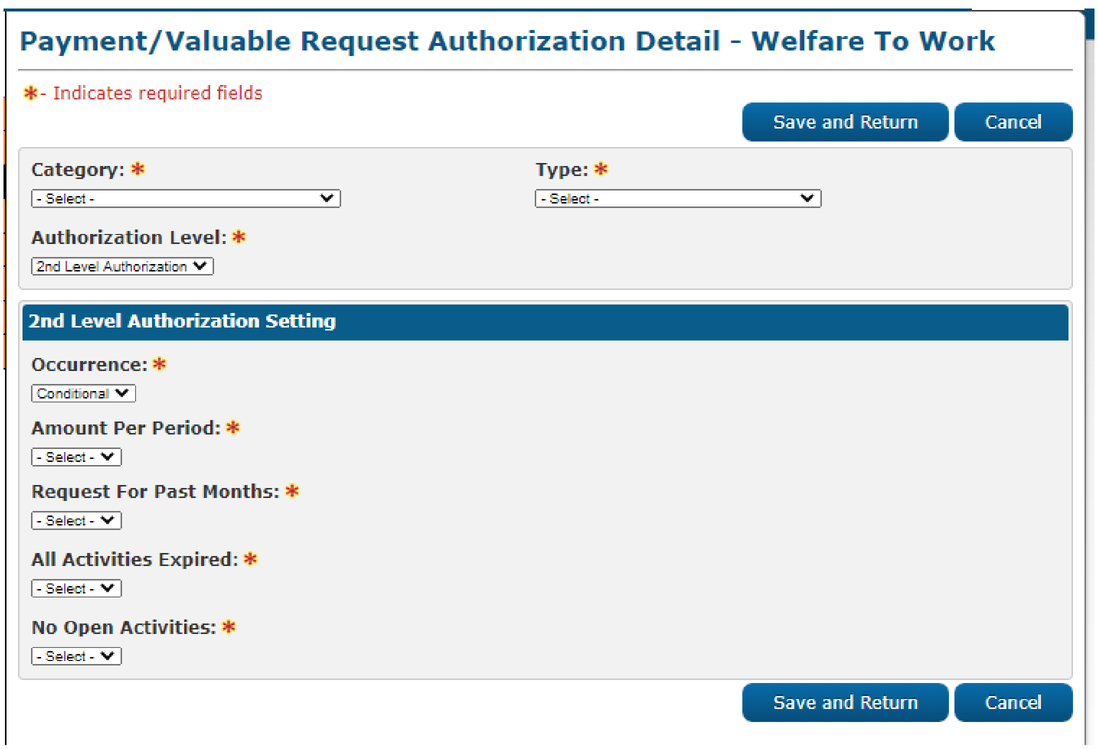


Figure 2.3.3 – Create Mode with Conditional 2nd Level Authorization

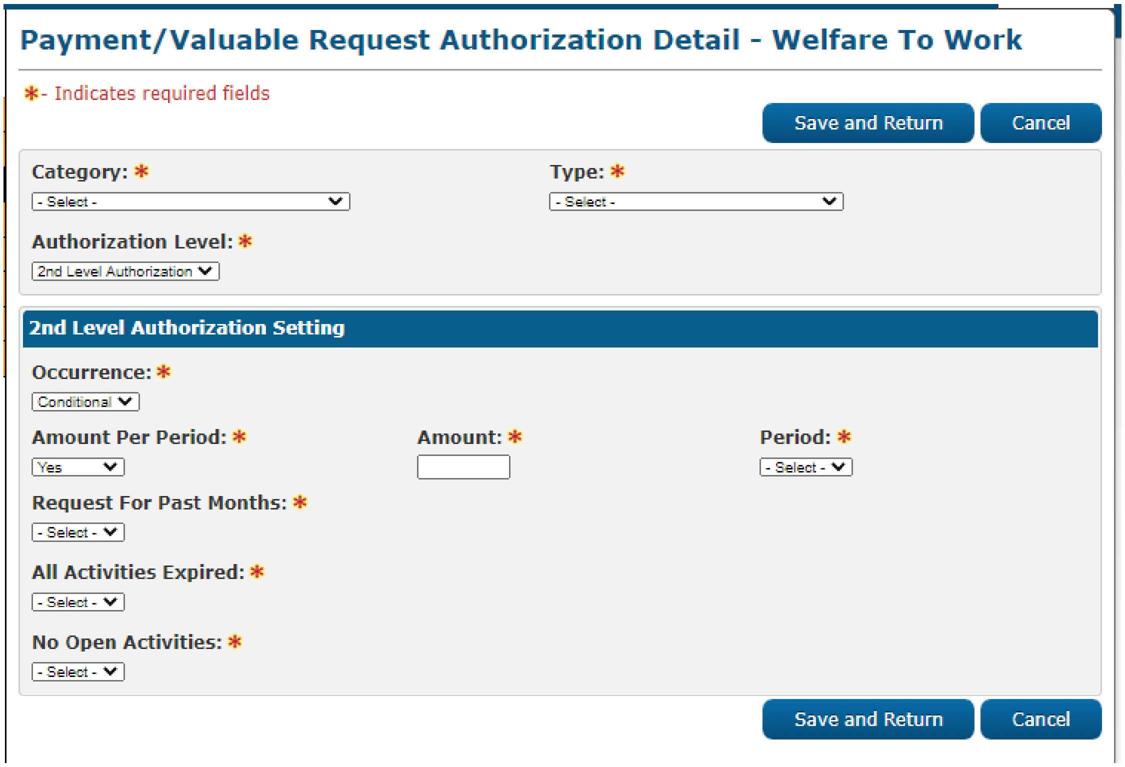


Figure 2.3.4 – Create Mode with Conditional 2nd Level Authorization and Amount Per Period

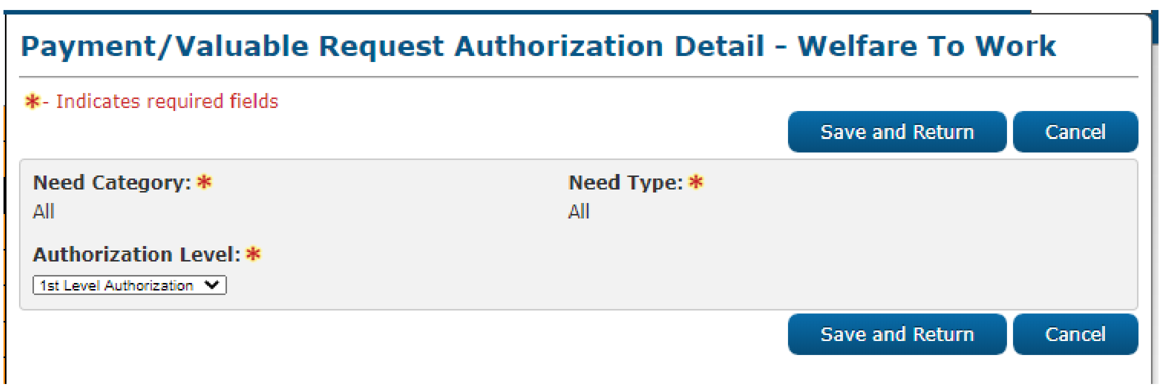


Figure 2.3.5 – Edit Mode with Non 2nd Level Authorization

Figure 2.3.6 – Edit Mode with Always 2nd Level Authorization

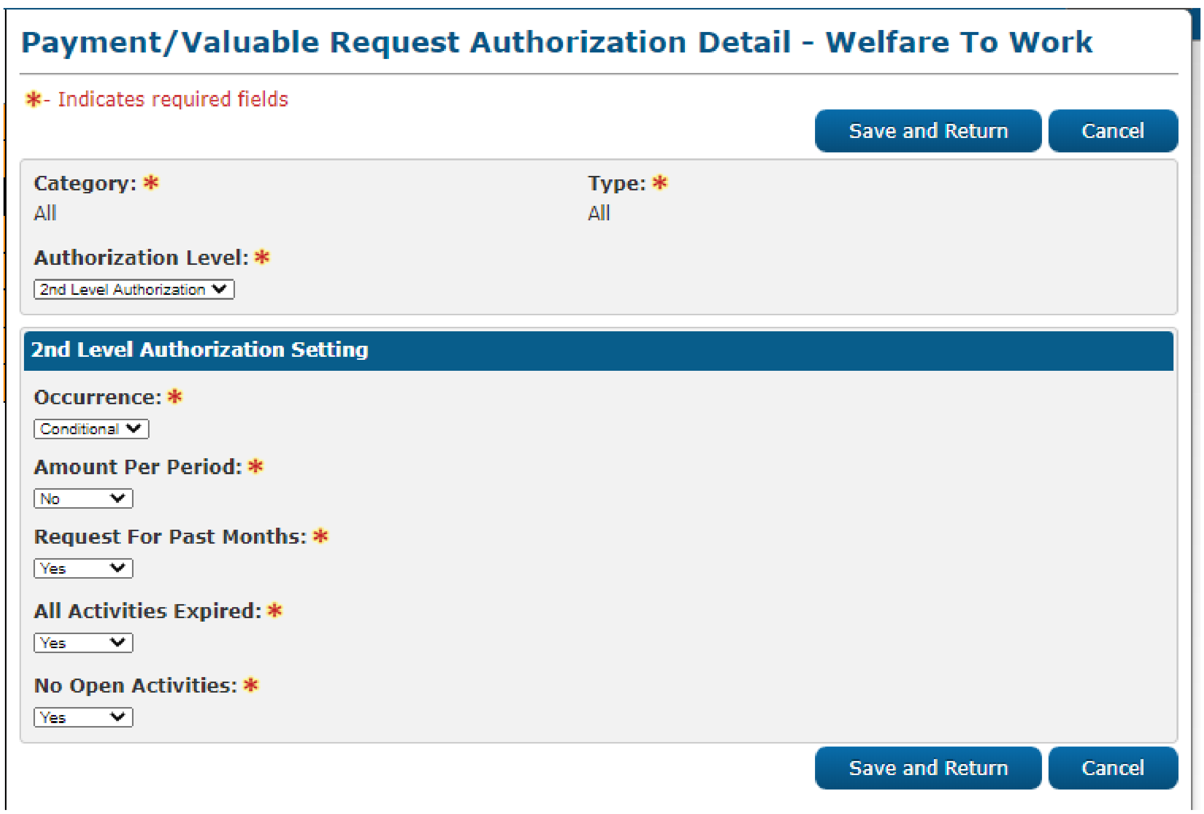


Figure 2.3.7 – Edit Mode with Conditional 2nd Level Authorization

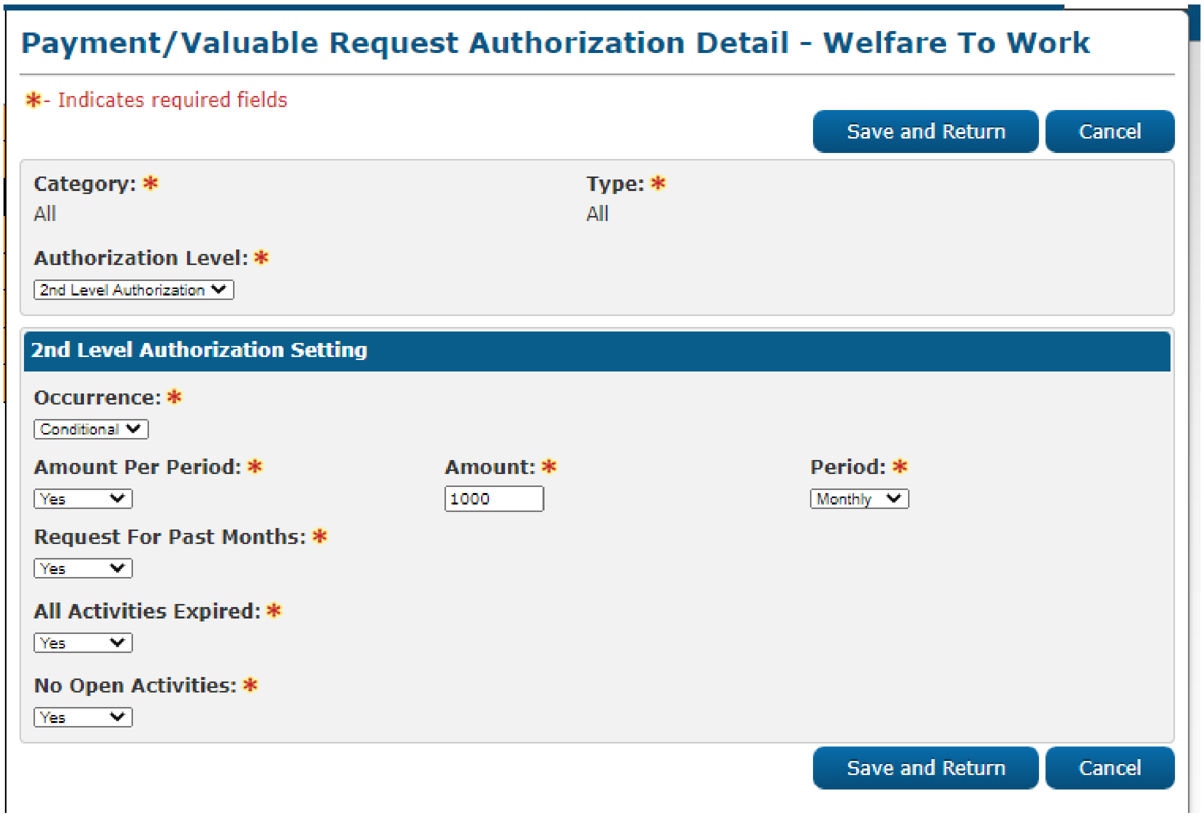


Figure 2.3.8– Edit Mode with Conditional 2nd Level Authorization and Amount Per Period

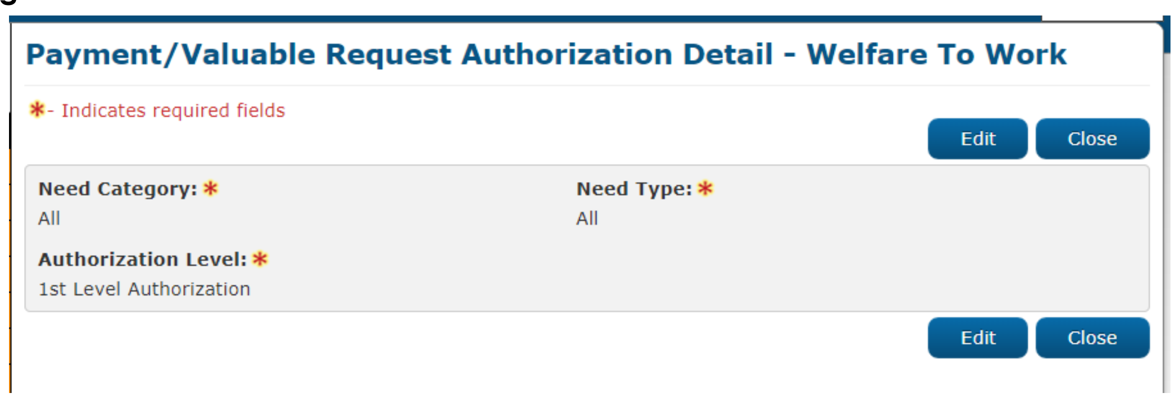


Figure 2.3.9 – View Mode with Non 2nd Level Authorization

Figure 2.3.10 – View Mode with Always 2nd Level Authorization

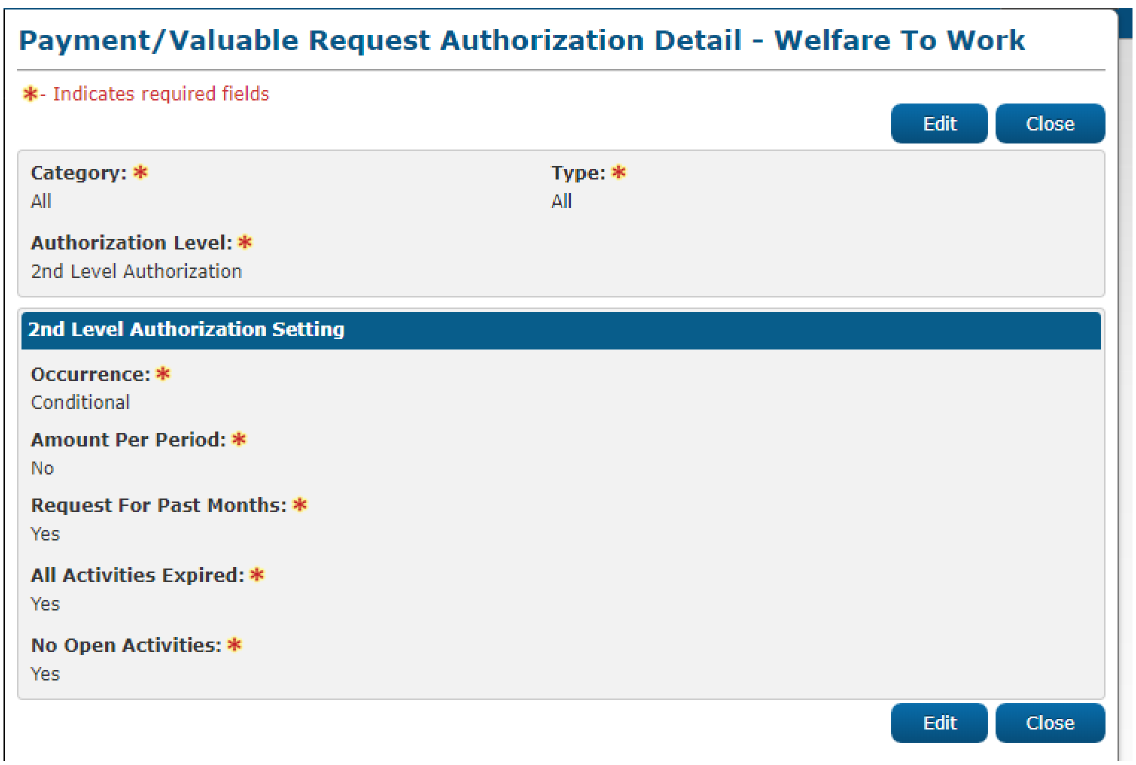


Figure 2.3.11 – View Mode with Conditional 2nd Level Authorization

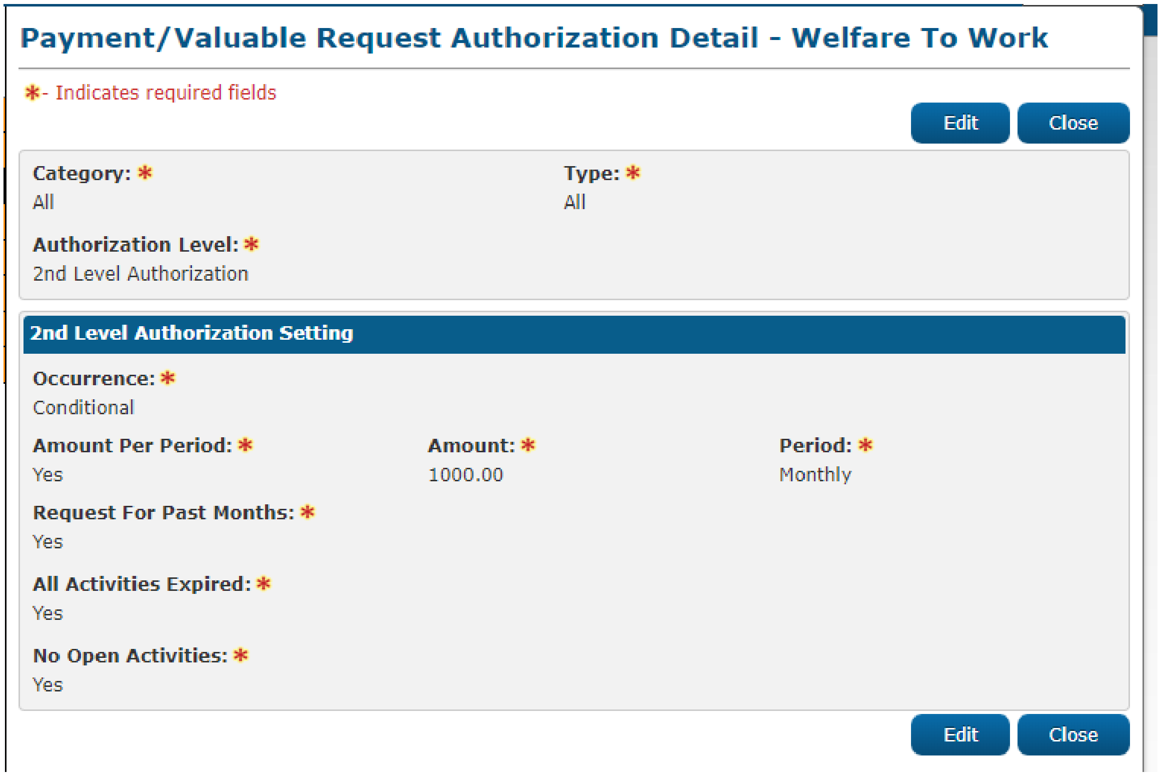


Figure 2.3.12 – View Mode with Conditional 2nd Level Authorization and Amount Per Period

2.3.3 Description of Changes

1. Add a new Payment/Valuable Request Authorization Detail page. Users with 'CountyAuthorizationEdit' or 'CountyAuthorizationView' security right can navigate to this page from Payment/Valuable Request Authorization List (section 2.2).
    a. The header format will be 'Payment/Valuable Request Authorization Detail – [Program]'. See figures 2.3.1.
    b. The page will have following fields:
        i. Category – This field will only be editable and mandatory in Create Mode. The dropdown will contain an 'All' option and need categories available for a program. The default value is '– Select –'.
        ii. Type – This field will only be editable and mandatory in Create Mode. The dropdown will contain an 'All' option and need types available for the selected need category. If no Category is selected, the dropdown will have no options. If Category is 'All', then 'All' is the only selectable option and the default value. Otherwise the default value is '– Select –'. Please see 'ProgramCategoryTypeMapping.xlsx' for option mapping.

When this field is set to 'All', the authorization setting will be applied to all types of the specified Category unless the type has its own Authorization Level defined.
For example, Authorization List for Welfare To Work below:

Category	Type	Authorization Level
Transportation	All	1st Level Authorization
Transportation	Bus Pass – No Valid Month	2nd Level Authorization

A Payment Request with 'Transportation' Category and 'Auto Repair' Type will only require 1st Level Authorization. However, a Payment Request with 'Transportation' Category and 'Bus Pass – No Valid Month' will require 2nd Level Authorization.

iii. Authorization Level – This field is editable and mandatory in both Create and Edit Mode. Selectable options are below:
    - – Select –
    - 1st Level Authorization
    - 2nd Level Authorization

    The default value is '– Select –' in Create Mode and last saved data in Edit Mode.

c. Add a '2nd Level Authorization Setting' section to allow users to customize 2nd Level authorization process. This section will only be visible if 2nd Level Authorization is chosen.

iv. Occurrence – This field will indicate when the 2nd Level Authorization will happen. It will be mandatory and editable in both Create and Edit Mode. Possible options are below:
    - – Select –
    - Always
    - Conditional

    The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

Below fields will only be visible and mandatory when Occurrence is 'Conditional':

i. Amount Per Period – This field will indicate that 2nd Level Authorization is required for certain amounts of payments. The possible options are:
    - - Select –
    - Yes
    - No

    The default value will be '– Select –' in Create Mode and last saved data in Edit Mode

ii. Amount – The minimum amount that will require 2nd Level Authorization. This field is only visible when 'Amount Per Period' field is Yes and becomes mandatory.

Add validation 'Please enter a positive amount in xx,xxx,xxx.xx format.' and prevent data from being saved.

iii. Period – This field will indicate the time frame of the minimum amount. Possible options are below:
    - – Select –
    - None
    - Monthly
    - Quarterly
    - Yearly
    - Biennial (Every Two years)
    - Lifetime

    This field is only visible and becomes mandatory when 'Amount Per Period' is Yes. The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.
    Note:
    When Period is 'None', the benefit amount of each Payment/Valuable Request will be checked against the value of the Amount field. For example, if Amount field is set to \$100.00 and Period field is set to 'None', every Payment/Valuable Request with \$100.00 of benefits or more will require 2nd Level Authorization, and a request with \$99.99 of benefits or less will require only 1st Level Authorization.
    Other Periods indicate that the value of the Amount field should be applied over a specified time frame. A combination of Period 'Yearly' and Amount \$100.00 means that when the total benefits of all Payment or Valuable Requests that a customer received for the specific need under the program within a year exceed \$100, it will require 2nd Level Authorization. The total benefits will include Payment/Valuable Requests with New, Pending Approval, and Approved status.

iv. Request For Past Months – This field will indicate whether 2nd Level Authorization is required when payments are requested for the past months. The possible options are:
    - - Select –
    - Yes
    - No

    The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

v. All Activities Expired – This field will indicate whether 2nd Level Authorization is required when all activities are expired. The possible options are:
    - - Select –
    - Yes
    - No

The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

vi. No Open Activities - This field will indicate whether 2nd Level Authorization is required when there are no open activities. The possible options are:
   - - Select –
   - Yes
   - No

   The default value will be '– Select –' in Create Mode and last saved data in Edit Mode.

d. Edit – This button will change the page to Edit mode. This button is only available in View mode. The security right of 'CountyAuthorizationEdit' is required to view this button.
e. Close – This button will be only available in View mode and navigate users to Payment/Valuable Request Authorization List page.
f. Cancel – This button is only available in Edit mode. This button will not save any changes made by users and navigate them to the page from where Edit Mode is accessed.
g. Save and Return – This button is only available in Edit mode. This button is used to save the changes made by users to the page and navigate them back to the Payment/Valuable Request Authorizations List.
h. Add a validation 'Combination of Category and Type already exists.' and stop data from being saved.
i. Add a validation 'At least one of the conditions must be 'Yes' When 2nd Level Authorization is Conditional.' and stop data from being saved.

2.3.4 Page Location

- **Global: Admin Tools**
- **Local: Admin**
- **Task: County Authorizations**

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
CountyAuthorizationView	View County Authorizations.	County Authorization View

Security Right	Right Description	Right to Group Mapping
		County Authorization Edit
CountyAuthorizationEdit	Edit County Authorizations.	County Authorization Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
County Authorization View	Gives the User the ability to view County Authorizations.	County Discretion
County Authorization Edit	Gives the User the ability to edit County Authorizations.	County Discretion

2.3.6 Page Mapping

Add page mapping for the Payment/Valuable Authorization Detail page.

2.3.7 Page Usage/Data Volume Impacts

None

2.4 Update Payment/Valuable Request Authorizations Logic

2.4.1 Overview

Update Payment Request Detail and Valuable Request Detail pages to use the new Payment/Valuable Request Authorization List to determine supervisor authorizations.

2.4.2 Description of Changes

1. Update Authorization logic on Payment Request Detail and Valuable Request Detail to determine supervisor authorizations based on the county specific settings on Payment/Valuable Request Authorization List page.
2. For L.A. County only, maintain 3rd Level Authorization, also known as second deputy approval, in backend logic. Payment/Valuable

Requests require 3rd Level Authorization when all following conditions are met:

a. The request is for the Welfare to Work benefits.
b. The request is for the Ancillary Work-Related Need Category.
c. The customer has a CalWORKs program that is not active under the same case.

Note: 3rd Level Authorization will not be available in Payment/Valuable Request Authorization Detail (section 2.3), and any change will require a SCR.

2.4.3 Program Impacted

All Supportive Service Programs

2.4.4 Performance Impacts

None

2.5 Data Change to Default Payment/Valuable Request Authorization Logic

2.5.1 Overview

Default authorization to the following values for Los Angeles County to maintain existing functionality, and for 57 migration counties to 1st Level Authorization.

2.5.2 Description of Change

1. Perform a data change as file 'All Counties Auth Level.xlsx' to default the for authorization for all counties.
2. Perform additional data change as file 'Los Angeles County Auth Level.xlsx' for Los Angeles County to maintain existing authorization level functionalities.

2.5.3 Estimated Number of Records Impacted/Performance

Approximately 150 records.

2.6 CTCR

1. Insert a new record with below attributes in Category table:
   CATGRY_NAME: County Fiscal Authorization Type
   REFER_TABLE_IND: N
2. Insert new records in Code_Detl table as below:

CODE_NUM _IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	LONG_DECODE_NAME	BEG_DATE	END_DATE
FI	(ID of County Fiscal Authorization Type)	Fiscal Authorization	Fiscal Authorization	1/1/1000	12/31/9999
ED	(ID of County Fiscal Authorization Type)	EDBC Threshold	EDBC Threshold	1/1/1000	12/31/9999
SU	(ID of County Fiscal Authorization Type)	Supportive Service Threshold	Supportive Service Threshold	1/1/1000	12/31/9999

3. Insert a new record with below attributes in Category table:
   CATGRY_NAME: Payment/Valuable Request Period
   REFER_TABLE_IND: N
4. Insert new records in Code_Detl table as below:

CODE_NUM _IDENTIF	CATGRY_ID	SHORT_DECODE_NAME	LONG_DECODE_NAME	BEG_DATE	END_DATE
NO	(ID of payment/valuable request period)	None	None	1/1/1000	12/31/9999
MO	(ID of payment/valuable request period)	Monthly	Monthly	1/1/1000	12/31/9999
QU	(ID of payment/valuable request period)	Quarterly	Quarterly	1/1/1000	12/31/9999
YE	(ID of payment/valuable request period)	Yearly	Yearly	1/1/1000	12/31/9999
BI	(ID of payment/valuable request period)	Biennially	Biennially	1/1/1000	12/31/9999
LI	(ID of payment/valuable request period)	Lifetime	Lifetime	1/1/1000	12/31/9999

2.7 Database Change Request

1. Create a new table 'COUNTY_FISCAL_AUTH' with the following columns:
   a. ID – This column will store system-generated unique identifier for each instance of this table.
      a. This column will not allow a null value.
      b. Data type will be number.

c. Comment will be 'This is a System-generated unique identifier for an instance of this table to be used as the primary key'.

b. COUNTY_CODE – This column will identify the county for which a record is created.
   i. This column will not allow null value.
   ii. Data type will be VARCHAR2(3 Byte).
   iii. Comment will be '15 - This column will contain the county for which a record is created.'

c. PGM_CODE – This column will store the program code for a record.
   a. This column will allow null value.
   b. Data type will be VARCHAR2(3 Byte).
   c. Comment will be '18 - The program code associated with a record'.

d. NEED_CAT_CODE – This column will store the Customer Need Category code.
   a. This column will allow null value.
   b. Data type will be VARCHAR2(3 Byte).
   c. Comment will be '163 - The Customer Need Category code.'

e. NEED_TYPE_CODE – This column will store the Customer Need Type code.
   a. This column will allow null value.
   b. Data type will be VARCHAR2(3 Byte).
   c. Comment will be '164 - The Customer Need Type code.'

f. COUNTY_AUTH_CODE – This column will indicate the authorization level of specified program, category, and type for a county.
   a. This column will allow null value.
   b. Data type will be VARCHAR2(3 Byte).
   c. Comment will be '10586 - This column will indicate the authorization level of specified program, category, and type for a county'

g. TYPE_CODE – This column will indicate a record is whether used for Fiscal Authorization or Issuance Threshold.
   a. This column will not allow null value.
   b. Data type will be VARCHAR2 (3 Byte).
   c. Comment will be '[new ID of Time Track Type in section 2.5.1] – This column will indicate a record is whether used for Fiscal Authorization or Issuance Threshold.'

h. AMT – This field will store the dollar amount of issuance threshold or minimum amount of authorization.
   a. This column will allow null value.
   b. Data type will be Number (10,2).
   c. Comment will be 'This field will store the dollar amount of issuance threshold or minimum amount of authorization'.

i. PERIOD_CODE – This field will store the period to which the amount is applied.
   a. This column will allow null value.

b. Data type will be VARCHAR2 (3 Byte).
c. Comment will be 'This field will store the period to which the amount is applied'.

j. PRIOR_MO_IND – This field will determine whether 2nd Level Authorization is required when requests are for past month.
    a. This column will allow null value.
    b. Data type will be VARCHAR2 (1 Byte).
    c. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when payment/valuable requests are for past month.'
k. OPEN_ACTIV_IND – This field will determine whether 2nd Level Authorization is required when there are no open activities.
    a. This column will allow null value.
    b. Data type will be VARCHAR2 (1 Byte).
    c. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when there are no open activities.'
l. EXPIRE_ACTIV_IND – This field will determine whether 2nd Level Authorization is required when all activities expired.
    a. This column will allow null value.
    b. Data type will be VARCHAR2 (1 Byte).
    c. Comment will be 'This field will be used to determine if 2nd Level Authorization is required when all activities are expired.'
m. CREATED_BY – This column will identify the person who creates an instance on this table.
    a. This column will not allow null value.
    b. Data type will be VARCHAR2(30 Byte).
    c. Comment will be ''This column captures the name of the person who created a specific instance on this table.'
n. UPDATED_BY – This column will identify the last person who updates an instance on this table.
    a. This column will not allow null value.
    b. Data type will be VARCHAR2(30 Byte).
    c. Comment will be 'This column captures the name of the person who last updated a specific instance on this table'
o. CREATED_ON – This column will store the date/time when an instance of this table is created.
    a. This column will not allow null value.
    b. Data type will be TIMESTAMP (6).
    c. Comment will be 'this column captures the date/time when a specific instance of this table was created.'
p. UPDATED_ON – This column will store the date/time when an instance of this table is last updated.
    a. This column will not allow null value.
    b. Data type will be TIMESTAMP (6).

c. Comment will be ‘This column captures the date/time when a specific instance of this table was last updated’.

Table comment will be ‘This Table stores counties’ authorization information for payment/valuable requests.’

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Testing	Mapping of programs, customer categories, and customer needs	ProgramCategoryTypeMapping.xlxs
2	DCR	Default Authorization Level for all counties.	All Counties Auth Level.xlsx
3	DCR	Additional Authorization set up for Los Angeles County	Los Angeles County Auth Level.xlsx

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1052, 1092, 1094, 1095, 1096	Enhance Supervisor Authorization (EDBC and Fiscal) functionality to include County configurability and the following Side by Side County Migration Requirements: 1) The CONTRACTOR shall update all Supervisor Authorization types to be configurable by county along with the percentage of authorization required. (#1092) 2) The CONTRACTOR shall create a rejection reason dropdown along with a non-mandatory free form text field to be displayed to the end user when a Pending Authorization is rejected on the Authorization Rejections page. (#1094) 3) The CONTRACTOR shall update the Supervisor Authorization functionality to include automated journal entries for Supervisor Authorizations actions taken in the system. (#1095) 4) The CONTRACTOR shall turn off the Supervisor Authorization functionality for the 57 Counties at the time of migration. (#1052) 5) The CONTRACTOR will add additional filter/sort criteria to the Pending Authorization List page to be able to filter/sort by expedited service programs. (#1096)	Supervisor Authorization functionality will be turned "Off" at go-live for the 57 C-IV and CalWIN counties and will remain enabled for LA County. The 57 Counties will begin using Supervisor Authorization post go-live as determined by their County leadership. (#1052) Configurability of the Supervisor Authorization functionality will only entail the ability for a County to configure by: on/off, percentage of authorization required by position and by threshold values. It will not entail the	Add new pages to configure authorizations by county for Payment and Valuable Requests.

		creation of additional data points/inputs for configurability. (#1052) The supervisor authorization types in the CalSAWS will be configured so that each county can elect to turn on or off an authorization type that has been pre-defined in the system along with the percentage of authorization required by position and/or the threshold. (#1092)	