

## CalSAWS CCB Agenda

|                 |   |
|-----------------|---|
| <b>DATE</b>     | 05/13/2021  |
| <b>TIME</b>     | 1:30 PM   |
| <b>LOCATION</b> | Teams Virtual Meeting   |
| <b>SUBJECT</b>  | Change Control Board Meeting  |
| <b>INVITEES</b> | Regional Managers, Design Leads, Tech Leads, Release Management Leads, Quality Assurance, State Partners, Consortium Management |

### Meeting Purpose:

Approve pending System Change Requests (SCRs), scope modifications, and change orders as needed.

### 1. C-IV SCRs

| Release | SCR #      | X-REF SCR | DESIGN APPROVAL   | Team Responsible | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|------------|-----------|---|------------------|-------|----------------|-----------------------|------------------|
| 21.03   | CIV-107315 | CA-216172 | Update Welfare Intercept System batch to resume sending Establishment, Reactivate records | Fiscal           | 38    | C-IV M&O       | Production Deployment | 21.04.23         |
| 21.03   | CIV-107763 |           | Create Case Data Removal Functionality  | Tech Arch        | 300   | C-IV M&O       | Production Deployment | 21.04.02         |
| 21.03   | CIV-108869 | CA-227176 | Issue April 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments        | Fiscal           | 195   | C-IV M&O       | Production Deployment | 21.05.15         |
| 21.07   | CIV-108834 |           | Update conflicting Staff IDs in C-IV and CalSAWS (Part 1)                                 | Online           | 52    | C-IV M&O       | Start Build           |                  |

| Release | SCR #      | X-REF SCR | CONTENT REVISION  | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-----------|---|------------------|-------|----------------|--------------------|------------------|
| 21.03   | CIV-108152 | CA-219543 | Test Effort for the CalFresh SSA COLA (Deferred to 03/2022) | Batch/Interfaces | 150   | C-IV M&O       | Start Build        | 21.05.xx         |

| Release | SCR #      | X-REF SCR | CONTENT REVISION   | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|------------|-----------|--|------------------|-------|----------------|--------------------|------------------|
| 21.05   | CIV-108368 |           | CIV-107763: Online Help - OLH Updates to support the Case Data Removal Functionality | Training         | 15    | C-IV M&O       | Start Build        | 21.04.22         |

## 2. LRS SCRs

| Release | SCR #     | X-REF SCR  | DESIGN APPROVAL   | Team Responsible      | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|------------|---|-----------------------|-------|----------------|-----------------------|------------------|
| RWR     | CA-215013 |            | DDID 2589 FDS: Non State Forms - Threshold Languages - Add State Form GEN 107 (ADM 107) | Client Correspondence | 35    | CalSAWS DD&I   | Start Build           | 21.03.x5         |
| RWR     | CA-215821 |            | Add the EBT 2216 in threshold languages   | Client Correspondence | 219   | LRS M&E        | Start Build           | 21.03.x5         |
| RWR     | CA-218759 |            | Update NA 820 and NA 821 with updates from CDSS   | Client Correspondence | 240   | CalSAWS DD&I   | No                    | 21.03.x5         |
| 21.03   | CA-215122 |            | DDID 2644 FDS: Non State Forms - Add New State Form CR 6181                             | Client Correspondence | 22    | CalSAWS DD&I   | Start Build           | 21.04.27         |
| 21.03   | CA-217173 |            | DDID 1791: C-IV Migration Batch Regression Test Support SCR                             | Batch/Interfaces      | 3255  | CalSAWS DD&I   | No                    | 21.06.11         |
| 21.03   | CA-227170 |            | Event Streaming: Enabling Event Streaming implementation for MEDS EW05 Transactions     | Batch/Interfaces      | 15    | CalSAWS DD&I   | Production Deployment | 21.04.15         |
| 21.03   | CA-227176 | CIV-108869 | Issue April 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments      | Fiscal                | 210   | LRS M&E        | Production Deployment | 21.05.15         |
| 21.03   | CA-227183 |            | Event Streaming: Enabling Event Streaming implementation for MEDS FX40 Transactions     | Batch/Interfaces      | 15    | CalSAWS DD&I   | Production Deployment | 21.04.29         |
| 21.03   | CA-227184 |            | Event Streaming: Enabling Event Streaming implementation for MEDS FX60 Transactions     | Batch/Interfaces      | 15    | CalSAWS DD&I   | Production Deployment | 21.04.29         |
| 21.03   | CA-227190 |            | Event Streaming: Enabling Event Streaming implementation for MEDS HI37 Transactions     | Batch/Interfaces      | 15    | CalSAWS DD&I   | Production Deployment | 21.04.15         |

| Release | SCR #     | X-REF SCR | DESIGN APPROVAL   | Team Responsible      | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|-----------|---|-----------------------|-------|----------------|-----------------------|------------------|
| 21.03   | CA-227191 |           | Event Streaming: Enabling Event Streaming implementation for MEDS HA20 Transactions                       | Batch/Interfaces      | 15    | CalSAWS DD&I   | Production Deployment | 21.04.29         |
| 21.05   | CA-223930 |           | Demobilization of Cudahy District #06 & Customer Service Enhancements - Boundaries Modification Project   | CalHEERS              | 318   | LRS M&E        | Start Build           | 21.06.10         |
| 21.05   | CA-224045 |           | Code Table 186 (Income Type Code) Updates for C-IV Migration  | Eligibility           | 182   | LRS M&E        | Production Deployment |                  |
| 21.05   | CA-224584 |           | Code Hierchy CT202 Updates for C-IV Migration   | Online                | 125   | LRS M&E        | Production Deployment |                  |
| 21.05   | CA-226404 |           | DDID 1631: Update the CA 800 ARC report in CalSAWS  | Analytics             | 130   | CalSAWS DD&I   | Start Build           | 21.05.xx         |
| 21.07   | CA-206711 |           | CalFresh Cost of Living Adjustment (COLA) NOA Changes   | Client Correspondence | 292   | LRS M&E        | Start Build           |                  |
| 21.07   | CA-207283 |           | DDID 1584: Update Collaborator Management and Search in CalSAWS   | Online                | 304   | CalSAWS DD&I   | No                    |                  |
| 21.07   | CA-217304 |           | DDID 34 FDS: Task Mgmt - Dashboard Updates  | Reports               | 465   | CalSAWS DD&I   | Start Build           | 21.08.xx         |
| 21.07   | CA-219117 |           | CalSAWS database parameter changes in preparation for CIV cutover   | DBA                   | 80    | LRS M&O        | No                    |                  |
| 21.07   | CA-223936 |           | DDID 1629 FDS: Task Mgt - Automated Actions for CSC Tasks   | Online                | 127   | CalSAWS DD&I   | Start Build           |                  |
| 21.07   | CA-225547 |           | Update CalSAWS Email architecture to use Email API  | Tech Arch             | 650   | CalSAWS DD&I   | No                    |                  |
| 21.07   | CA-226241 |           | Update Batch EDBC logic so CF and SNB run together for Converted EDBC                                     | Batch/Interfaces      | 140   | LRS M&E        | No                    |                  |
| 21.07   | CA-226242 |           | Update Batch EDBC logic for Automated Administrative MAGI MC Renewals to no longer exclude converted EDBC | Batch/Interfaces      | 97    | LRS M&E        | No                    |                  |
| 21.07   | CA-226343 |           | DDID 2630: Update IEVS PVS trigger for form CSF 162   | Batch/Interfaces      | 60    | CalSAWS DD&I   | No                    |                  |
| 21.07   | CA-226923 |           | Update CMIPS Batch Jobs for Migration Counties  | Batch/Interfaces      | 296   | LRS M&E        | No                    | 21.08.xx         |
| 21.07   | CA-227257 |           | Update the Non-MAGI Screening and Turning 65 Packets to be available to all counties                      | Client Correspondence | 295   | LRS M&E        | No                    | 21.08.XX         |

| Release | SCR #     | X-REF SCR | DESIGN APPROVAL   | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|---------|-----------|-----------|---|------------------|-------|----------------|--------------------|------------------|
| 21.07   | CA-227265 |           | Update CCSAS interface logic of sending/receiving CPS case number | Batch/Interfaces | 278   | LRS M&E        | Start Build        |                  |
| 21.07   | CA-227343 |           | Update Long Term Sanction Logic for C-IV Converted Data           | Eligibility      | 187   | LRS M&E        | Start Build        |                  |
| 21.11   | CA-213759 |           | Update Child Support Interface to send correct Begin Date         | Batch/Interfaces | 363   | LRS M&E        | No                 |                  |

| Release | SCR #     | X-REF SCR               | CONTENT REVISION  | Team Responsible | Hours | Funding Source | Emergency Approval    | Priority Release |
|---------|-----------|-------------------------|---|------------------|-------|----------------|-----------------------|------------------|
| RWR     | CA-214740 |                         | DDID 2297 FDS: API - Case API   | Batch/Interfaces | 536   | CalSAWS DD&I   | No                    | 21.05.x1         |
| RWR     | CA-214745 |                         | DDID 2342 FDS: API - Appointment API  | Batch/Interfaces | 536   | CalSAWS DD&I   | No                    | 21.03.x5         |
| RWR     | CA-214748 |                         | DDID 2345 FDS: API - Documents API  | Batch/Interfaces | 211   | CalSAWS DD&I   | No                    | 21.05.x1         |
| RWR     | CA-214753 |                         | DDID 2350 FDS: API - Program API  | Batch/Interfaces | 536   | CalSAWS DD&I   | No                    | 21.05.x1         |
| RWR     | CA-214755 |                         | DDID 2352 FDS: API - Task API   | Batch/Interfaces | 536   | CalSAWS DD&I   | Start Build           | 21.03.x5         |
| 21.01   | CA-200366 |                         | Migration SCR for CCR   | Eligibility      | 3031  | Premise        | Start Build           |                  |
| 21.03   | CA-213719 | CIV-106463              | ACL 19-76: Batch EDBC Run to Apply 2021 Earned Income Disregard and Reevaluate IRT Tier 2 | Eligibility      | 430   | Premise        | Production Deployment | 21.05.08         |
| 21.03   | CA-214751 |                         | DDID 2348 FDS: API - Journal API  | Batch/Interfaces | 211   | CalSAWS DD&I   | No                    | 21.04.19         |
| 21.03   | CA-214760 |                         | DDID 2357 FDS: API - Worker Schedule API  | Batch/Interfaces | 536   | CalSAWS DD&I   | Start Build           | 21.04.19         |
| 21.03   | CA-219543 | CIV-108152              | Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)                               | Batch/Interfaces | 451   | LRS M&E        | Start Build           | 21.05.xx         |
| 21.03   | CA-220787 |                         | Update Eligibility Supervisor WBTs for 20.11 and 21.01 App Dev Changes                    | Training         | 44    | LRS M&E        | No                    | 21.05.21         |
| 21.03   | CA-226000 |                         | DDID 34 FDS: Task Mgt - Legacy Task Category  | Online           | 126   | CalSAWS DD&I   | Start Build           | 21.04.22         |
| 21.05   | CA-207026 | CIV-103540, CIV-103539, | Migrate C-IV Contact Center Functionality   | Contact Center   | 3516  | Premise        | No                    |                  |

| Release | SCR #     | X-REF SCR  | CONTENT REVISION  | Team Responsible      | Hours | Funding Source  | Emergency Approval | Priority Release |
|---------|-----------|--|---|-----------------------|-------|-----------------|--------------------|------------------|
|         |           | CIV-103666,<br>CIV-103667,<br>CIV-103668,<br>CIV-103669,<br>CIV-103670,<br>CIV-103671,<br>CIV-103672,<br>CIV-103673,<br>CIV-103674,<br>CIV-103675,<br>CIV-103676,<br>CIV-103677,<br>CIV-103677,<br>CIV-103678,<br>CIV-103679 |   |                       |       |                 |                    |                  |
| 21.05   | CA-207394 |  | DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Hard Launch #4)         | Analytics             | 62    | CalSAWS DD&I    | No                 | 21.06.15         |
| 21.05   | CA-207637 |  | ACL 19-93 - ABAWD - Phase III   | Eligibility           | 8511  | Premise         | Start Build        |                  |
| 21.05   | CA-222989 |  | ID fields in the CalSAWS Application need to be updated to support larger values.   | Online                | 195   | LRS M&E         | Start Build        |                  |
| 21.06   | CA-224280 | CIV-108548   | Automated Regression Test - Execution and Maintenance - 21.05 Release Cycle         | Automated Test        | 560   | LRS M&E         | Start Build        | 21.07.21         |
| 21.07   | CA-50300  |  | Update CalSAWS Transportation Type Dropdown on the Need Detail Page                 | Fiscal                | 188   | LRS M&E         | No                 |                  |
| 21.07   | CA-58579  | CIV-10665  | ACWDL 17-31 Revisions to the NA Back 9 for all Medi-Cal Notices of Action           | Client Correspondence | 193   | LRS M&E         | No                 |                  |
| 21.07   | CA-207131 |  | DDID 2208 - Add Appointments/Tasks Assigned to Unavailable Workers Dashboard        | Reports               | 625   | CalSAWS DD&I    | Start Build        |                  |
| 21.07   | CA-220977 |  | Rekey Nuance Voice Biometrics Speaker ID, and Migrate Predictive Handling Batch Job | Contact Center        | 979   | County Purchase | No                 |                  |
| 21.07   | CA-224281 | CIV-108549   | Automated Regression Test - Execution and Maintenance - 21.07 Release Cycle         | Automated Test        | 960   | LRS M&E         | No                 | 21.11.17         |

### 3. Informational Only: CalSAWS Conversion SCRs

| Release     | SCR # | X-REF SCR | DESIGN APPROVAL | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|-------------|-------|-----------|-----------------|------------------|-------|----------------|--------------------|------------------|
| <i>None</i> |       |           |                 |                  |       |                |                    |                  |

| Release     | SCR # | X-REF SCR | CONTENT REVISION | Team Responsible | Hours | Funding Source | Emergency Approval | Priority Release |
|-------------|-------|-----------|------------------|------------------|-------|----------------|--------------------|------------------|
| <i>None</i> |       |           |                  |                  |       |                |                    |                  |

The next CCB Meeting scheduled for **05/27/2021**.

#### 4. CalACES Development Schedule

| Release # | Release Date (Mon) | CalSAWS (North & South) Production Deployment Date (Sun) | Notes  | SCR Freeze (Fri) | Defect Freeze (Fri) | DBCR/CTC R Freeze (Wed) | Hard Defect Freeze (Fri) | Build Approved (Wed) |
|-----------|--------------------|--|--|------------------|---------------------|-------------------------|--------------------------|----------------------|
| 20.09     | 9/21/2020          | 9/20/2020  |  | 7/24/2020        | 8/28/2020           |                         | 9/4/2020                 | 9/16/2020            |
| 20.11     | 11/23/2020         | 11/22/2020   | Due to Thanksgiving 11/26/2020                         | 9/25/2020        | 10/30/2020          |                         | 11/6/2020                | 11/18/2020           |
| 21.01     | 1/25/2021          | 1/24/2021  | North & South Release; MLK 1/18                        | 11/27/2020       | 1/1/2021            | 01/06/2021              | 1/8/2021                 | 1/20/2021            |
| 21.02     | 2/15/2021          | 2/14/2021  | CH Release (North & South Release)                     | 11/6/2020        | 1/22/2021           | 01/27/2021              | 1/29/2021                | 2/10/2021            |
| 21.03     | 3/22/2021          | 3/21/2021  | North & South Release                                  | 1/29/2021        | 2/26/2021           | 3/3/2021                | 3/5/2021                 | 3/17/2021            |
| 21.04     | 4/26/2021          | N/A  | CH Cloud Release                                       | N/A              | N/A                 | N/A                     | N/A                      | N/A                  |
| 21.05     | 5/24/2021          | 5/23/2021  | Due to Memorial Day 5/31 (North & South Release)       | 3/26/2021        | 4/30/2021           | 5/5/2021                | 5/7/2021                 | 5/19/2021            |
| 21.06     | 6/21/2021          | 6/20/2021  | CH Release (North & South Release)                     | 4/9/2021         | 5/28/2021           | 6/2/2021                | 6/04/2021                | 6/16/2021            |
| 21.07     | 7/26/2021          | 7/25/2021  | Last C-IV Baseline Release                             | 5/28/2021        | 7/2/2021            | 7/7/2021                | 7/9/2021                 | 7/21/2021            |
| 21.09     |                    |  | No Release - C-IV Converts to CalSAWS                  |                  |                     |                         |                          |                      |
|           |                    |  | C-IV to CalSAWS Cutover (End of September)             | N/A              | N/A                 |                         | N/A                      | N/A                  |
| 21.11     | 11/22/2021         | 11/21/2021   |  | 8/27/2021        | 10/29/2021          | 11/3/2021               | 11/5/2021                | 11/17/2021           |
| 22.01     | 1/24/2022          | 1/23/2022  |  | 11/26/2021       | 12/31/2021          | 1/5/2022                | 1/7/2022                 | 1/19/2022            |
| 22.02     | TBD                |  | CH Release   |                  |                     |                         |                          |                      |
| 22.03     | 3/21/2022          | 3/20/2022  |  | 1/28/2022        | 2/25/2022           | 3/3/2022                | 3/4/2022                 | 3/16/2022            |
| 22.05     | 5/23/2022          | 5/22/2022  | Due to Memorial Day 5/30                               | 3/25/2022        | 4/29/2022           | 5/4/2022                | 5/6/2022                 | 5/18/2022            |
| 22.06     | TBD                |  | CH Release   |                  |                     |                         |                          |                      |
| 22.07     | 7/25/2022          | 7/24/2022  |  | 5/27/2022        | 7/1/2022            | 7/6/2022                | 7/8/2022                 | 7/20/2022            |
| 22.09     | 9/26/2022          | 9/25/2022  |  | 7/29/2022        | 9/2/2022            | 9/7/2022                | 9/9/2022                 | 9/21/2022            |
|           |                    |  | CalWIN to CalSAWS Wave 1 Cutover (End of October 2022) | N/A              | N/A                 |                         | N/A                      | N/A                  |

|       |                   |            |   |                   |                 |           |           |                 |
|-------|-------------------|------------|---|-------------------|-----------------|-----------|-----------|-----------------|
| 22.11 | <b>11/21/2022</b> | 11/20/2022 |   | <b>9/30/2022</b>  | 10/28/2022<br>2 | 11/2/2022 | 11/4/2022 | 11/16/2022<br>2 |
| 23.01 | <b>1/23/2023</b>  | 1/22/2023  |   | <b>11/26/2022</b> | 12/30/2022<br>2 | 1/4/2023  | 1/6/2023  | 1/18/2023<br>3  |
|       |                   |            | CalWIN to CalSAWS Wave 2 Cutover (End of February 2023) | <b>N/A</b>        | N/A             |           | N/A       | N/A             |
|       |                   |            | CalWIN to CalSAWS Wave 3 Cutover (End of April 2023)    | <b>N/A</b>        | N/A             |           | N/A       | N/A             |
|       |                   |            | CalWIN to CalSAWS Wave 4 Cutover (End of June 2023)     | <b>N/A</b>        | N/A             |           | N/A       | N/A             |
|       |                   |            | CalWIN to CalSAWS Wave 5 Cutover (End of August 2023)   | <b>N/A</b>        | N/A             |           | N/A       | N/A             |
|       |                   |            | CalWIN to CalSAWS Wave 6 Cutover (End of October 2023)  | <b>N/A</b>        | N/A             |           | N/A       | N/A             |

| <b>Freeze Dates</b> |  |
|---------------------|--|
| SCR Freeze:         | Deadline for all SCR code to be delivered for baseline release                           |
| Defect Freeze:      | Deadline for all Defects to be delivered for baseline release                            |
| Hard Defect Freeze: | Deadline for all Defects (tied to baseline release) to be delivered for baseline release |
| Build Approved:     | Greenlight for baseline release  |

Updates:  
5/12/2020 – CH Release date changed



# [CIV-107315] Update Welfare Intercept System batch to resume sending Establishment, Reactivate records

- Resolved: 04/23/2021 04:40 PM

|                                   |                         |                        |                              |                               |                            |
|-----------------------------------|-------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>           | Assignee:              | <b>Reese Williams</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.03]</b>          | Designer Contact:      | <b>Ishrath Khan</b>          | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.23</b>         | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>38</b>                  |
| Reporter:                         | <b>Sidhant Garg</b>     | Regulation Reference:  |                              | Created:                      | <b>05/20/2020 04:32 PM</b> |
| Status:                           | <b>In Production</b>    | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</b> | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR):              | <b>Production</b>       | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                        | <b>[Tax Intercept]</b>  | Approved by Committee: |                              | Other Agency Cross Reference: | <b>CA-216172</b>           |

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 03/16/2020

**Current Design:** CIV-106791 updated the WIS Batch to no longer send the following Record Types:  
 1 - Establish  
 9 - Reactivate (except when a Reactivate is being sent as part of 2-Decrease or 3-Delete).

**Request:** Resume the WIS batch job to send the Establish and Reactivate records on 04/23

**Recommendation:** Update the C-IV WIS Batch to resume sending the following Record Types on 04/23:  
 1 - Establish  
 9 - Reactivate (except when a Reactivate is being sent as part of 2-Decrease or 3-Delete).

To Implement the above recommendation do a BPCR to turn on the following modules in the weekly WIS Tax Intercept job (POXXF604):

- 1.org.civ.interfaces.collections.taxintercept.TaxInterceptReactivate
- 2.org.civ.interfaces.collections.taxintercept.TaxInterceptWriter

### Outreach

#### Description:

**Migration Impact Description:** N/A

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** 38

|                       |    |                    |   |                                 |   |
|-----------------------|----|--------------------|---|---------------------------------|---|
| Automated Test :      | 0  | Batch/Interfaces : | 0 | Batch Operations :              | 0 |
| CalHEERS :            | 0  | CalHEERS Test :    | 0 | Client Correspondence :         | 0 |
| DBA :                 | 0  | Design :           | 0 | Eligibility :                   | 0 |
| Fiscal :              | 28 | Imaging :          | 0 | IVR/CC :                        | 0 |
| Online :              | 0  | Performance :      | 0 | Release Communication Support : | 0 |
| Reports :             | 0  | Reports Test :     | 0 | Security :                      | 0 |
| System Test Support : | 10 | Tech Arch :        | 0 | Tech Ops :                      | 0 |
| Training :            | 0  | Translation :      | 0 |                                 |   |

# [CIV-107763] Create Case Data Removal Functionality

- Resolved: 04/14/2021 03:15 PM

|                                   |                          |                        |                              |                               |                            |
|-----------------------------------|--------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Tech Arch</b>         | Assignee:              | <b>Michael A. Wright</b>     | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.03]</b>           | Designer Contact:      | <b>Chris Larson</b>          | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.02</b>          | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>300</b>                 |
| Reporter:                         | <b>Michael A. Wright</b> | Regulation Reference:  |                              | Created:                      | <b>08/10/2020 02:52 PM</b> |
| Status:                           | <b>In Production</b>     | Impact Analysis:       | <b>[Batch Performance]</b>   | Outreach Required:            | <b>Yes</b>                 |
| Policy/Design Consortium Contact: | <b>Frederick Gains</b>   | Training Impacted:     |                              | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR):              | <b>Production</b>        | Migration Impact:      | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                        | <b>[Usability]</b>       | Approved by Committee: |                              | Other Agency Cross Reference: |                            |

## Non-Committee

### Review:

**Expedite Approval:** Frederick Gains for Laura Chavez 4/14/2021

**Current Design:** C-IV retains all case data, regardless of the age of the case. I.e., nothing is ever deleted from the system

**Request:** Create a Case Data Removal process to identify and remove cases through a Batch process following PSC-approved records retention policies

### Recommendation:

- 1) Create a DBCR to create a case data removal table to track and flag cases identified for deletion.
- 2) Create CTCRs to insert the Case Data Removal status and override reasons for each case identified in the case data removal table
- 3) Create a report to list all of the cases up for removal for the Counties to review prior to them being deleted
- 4) Create a Case Data Removal Override Report for counties to see which Cases have had their purge decision overridden (including who did it and the reason)
- 5) Create a Case Data Removal summary page with an option to override the case from being removed and to display the current status of the deletion process
- 6) Create batch jobs to load records into the case data removal table and to subsequently delete records from tables

Note: For reporting tables impacted with this effort, we will only be removing records that have a relationship to the CASE or PERS table.

The Case Data Removal History features from our Epic 4, will only be implemented with the CalSAWS Case Data Removal effort.

### Outreach

**Description:** Regional Manager and Section Directors will be updated on Sprint features to be delivered at the conclusion of each Sprint. We will also conduct user demos at the conclusion of any Sprint that contains user-facing features.

**Migration Impact Description:** This will only be deployed to the C-IV System

**Migration Impact Analysis:** No Impact

**Alternative Procedure Description:** N/A This will be new functionality

### Operational Impact:

**Estimate:** **300**

|                  |   |                    |   |                                 |   |
|------------------|---|--------------------|---|---------------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations :              | 0 |
| CalHEERS :       | 0 | CalHEERS Test :    | 0 | Client Correspondence :         | 0 |
| DBA :            | 0 | Design :           | 0 | Eligibility :                   | 0 |
| Fiscal :         | 0 | Imaging :          | 0 | IVR/CC :                        | 0 |
| Online :         | 0 | Performance :      | 0 | Release Communication Support : | 0 |

---

|                       |   |                |     |            |   |
|-----------------------|---|----------------|-----|------------|---|
| Reports :             | 0 | Reports Test : | 0   | Security : | 0 |
| System Test Support : | 0 | Tech Arch :    | 300 | Tech Ops : | 0 |
| Training :            | 0 | Translation :  | 0   |            |   |

## [CIV-108869] Issue April 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

|                                   |                             |                        |                                   |                               |                            |
|-----------------------------------|-----------------------------|------------------------|-----------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>               | Assignee:              | <b>Reese Williams</b>             | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.03]</b>              | Designer Contact:      | <b>Sidhant Garg</b>               | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:                    | <b>21.05.15</b>             | Expedite Changes:      | <b>Production Deployment</b>      | Estimate:                     | <b>195</b>                 |
| Reporter:                         | <b>Kapil Santosh</b>        | Regulation Reference:  | <b>ACWDL dated April 16, 2021</b> | Created:                      | <b>04/06/2021 02:10 PM</b> |
| Status:                           | <b>System Test</b>          | Impact Analysis:       | <b>[N/A]</b>                      | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</b>     | Training Impacted:     | <b>[N/A]</b>                      | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR):              | <b>Production</b>           | Migration Impact:      | <b>No</b>                         | Funding Source ID:            |                            |
| Committee:                        | <b>[CalWORKs/ CalFresh]</b> | Approved by Committee: |                                   | Other Agency Cross Reference: | <b>CA-227176</b>           |

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 04/20/2021

#### Current Design:

The CalACES System allows the issuance of Disaster CalFresh (CF) supplemental benefits. When Disaster Services are enabled for a County, staff can:

- 1) Issue Disaster Services pre-embossed EBT cards provided by the EBT Vendor.
- 2) Issue Disaster Benefits by running a Manual EDBC with a run reason of DCFP/Supp-DCFP (Supplemental). These EDBC's are not factored into the previous potential benefit calculations for the benefit month in which they are issued.

#### Request:

CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval to supplement all current CalFresh recipients up to the Maximum Allotment for the February and March 2021 benefit month. CalFresh households will receive a minimum emergency allotment of \$95 per month for the April 2021 benefit month.

#### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the February 2021 and March 2021 benefit months for all CalFresh and TCF recipients who are Active for the month, have received less than the maximum allotment for their household size, and have not received the Emergency Allotment benefit based on the following conditions:
    - a. Include all cases with Active CalFresh program in February 2021 and March 2021 benefit months and no Emergency Allotment issued.
    - b. Use the household size from the latest Accepted and Saved Regular EDBC
    - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
    - d. Exclude any Overpayments from the previous potential benefit calculation.
    - e. Include cases that were skipped earlier. Insert a record in ISSUANCE\_TRANSACT for these records.
    - f. Create the manual EDBC records with RECALC\_IND = 'N'
  - 2) Create a DCR to insert Manual EDBC records for the April 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
    - a. Include all cases with Active CalFresh program in April 2021 and no Emergency Allotment Issued.
    - b. Use the household size from the latest Accepted and Saved Regular EDBC
    - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.

Note: If the household has already received CalFresh benefit up to the maximum allotment for April 2021, the authorized amount for the manual EDBC would be set to \$95.

    - d. Exclude any Overpayments from the previous potential benefit calculation.
    - e. Exclude the TCF cases with Overdue recert.
    - f. Create the manual EDBC records with RECALC\_IND = 'N'
  - 3) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.
- NOTE: Validate FIS has turned on CF03 EBT Benefit Type.

4) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.

5) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.

6) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.

7) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For February 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 05/15/2021 due to COVID-19

Long Description: Per direction from ACWDL dated January 29, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For March 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 05/15/2021 due to COVID-19

Long Description: Per direction from ACWDL dated February 25, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For April 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 05/15/2021 due to COVID-19

Long Description: Per direction from ACWDL dated April 16, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

8) Generate a list of the Issuances where the Disaster Supplements were issued. The List will contain the following data elements:

- a. Case Name
- b. Case Number
- c. County Name
- d. Program
- e. Benefit Month
- f. Supp DCF Amount
- g. Issuance Sub Category
- h. Availability Date
- i. Issuance Status
- j. Payee Name ( the format would be Last Name, First Name)
- k. Household Size
- l. Is TCF Benefit
- m. Unit
- n. Unit Name
- o. Office Name
- p. Worker Name
- q. Worker Id

NOTE:

1. No NOA's will be sent - the County will utilize media and/or posters in the Reception Lobby to announce potential to Disaster Supplement benefits. Also daily ad-hoc reports will be handled by County Reports Team
2. CF03 will be used as the benefit Type when sending the issuances to FIS.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. CalSAWS will implement this Change with SCR CA-227176 in the R21.05.15 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**195**

|                       |     |                    |   |                         |   |
|-----------------------|-----|--------------------|---|-------------------------|---|
| Automated Test :      | 0   | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :            | 0   | CalHEERS Test :    | 0 | Client Correspondence : | 0 |
| DBA :                 | 0   | Design :           | 0 | Eligibility :           | 0 |
| Fiscal :              | 137 | Imaging :          | 0 | IVR/CC :                | 0 |
| Online :              | 0   | Performance :      | 0 | Release Communication   | 0 |
| Reports :             | 15  | Reports Test :     | 0 | Support :               | 0 |
| System Test Support : | 43  | Tech Arch :        | 0 | Security :              | 0 |
| Training :            | 0   | Translation :      | 0 | Tech Ops :              | 0 |

## [CIV-108834] Update conflicting Staff IDs in C-IV and CalSAWS (Part 1)

|                                   |                         |                        |                      |                               |                            |
|-----------------------------------|-------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>           | Assignee:              | <b>Unassigned</b>    | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:      | <b>Farhat Ulain</b>  | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:                    |                         | Expedite Changes:      | <b>Start Build</b>   | Estimate:                     | <b>52</b>                  |
| Reporter:                         | <b>Matthew Lower</b>    | Regulation Reference:  |                      | Created:                      | <b>03/29/2021 07:00 PM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:       | <b>[Data Impact]</b> | Outreach Required:            | <b>Yes</b>                 |
| Policy/Design Consortium Contact: | <b>Dymas Pena</b>       | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR):              | <b>Production</b>       | Migration Impact:      | <b>No</b>            | Funding Source ID:            |                            |
| Committee:                        | <b>[Usability]</b>      | Approved by Committee: |                      | Other Agency Cross Reference: |                            |

### Non-Committee

#### Review:

**Expedite Approval:** Karen Rapponotti Approved 4/19/2021

**Current Design:** Staff IDs are used in the system to identify a particular staff member and track specific data that is created or updated by the given staff member. There are seven (7) Staff IDs that exist in both the CalSAWS and C-IV systems.

**Request:** Update the seven (7) Staff records in the C-IV system to be new values which are unique in both the CalSAWS and C-IV systems.

**Recommendation:** Apply a DCR to update following Staff IDs, that are overlapping between CalSAWS and C-IV, with new Staff IDs. Additionally, replace references in the database to align the new Staff Id where the old Staff Id was stored. Currently, overlapping Staff IDs in C-IV & LRS are:

249763  
251634  
253783  
250654  
250604  
250605  
252776

Note: Columns 'UPDATED\_BY' & 'CREATED\_BY' will be updated with a future SCR.

### Outreach

Notification to the impacted Staff members.

#### Description:

**Migration Impact Description:** There is no Migration impact.

#### Migration Impact Analysis:

**Alternative Procedure Description:** N/A

#### Operational Impact:

**Estimate:** **52**

|                       |    |                    |   |                                 |   |
|-----------------------|----|--------------------|---|---------------------------------|---|
| Automated Test :      | 0  | Batch/Interfaces : | 0 | Batch Operations :              | 0 |
| CalHEERS :            | 0  | CalHEERS Test :    | 0 | Client Correspondence :         | 0 |
| DBA :                 | 0  | Design :           | 0 | Eligibility :                   | 0 |
| Fiscal :              | 0  | Imaging :          | 0 | IVR/CC :                        | 0 |
| Online :              | 40 | Performance :      | 0 | Release Communication Support : | 0 |
| Reports :             | 0  | Reports Test :     | 0 | Security :                      | 0 |
| System Test Support : | 12 | Tech Arch :        | 0 | Tech Ops :                      | 0 |

**End SCRs**



# [CIV-108152] Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)

- Resolved: 12/30/2020 08:52 AM

|                      |                                |                       |                         |                    |                            |
|----------------------|--------------------------------|-----------------------|-------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b>        | Assignee:             | <b>Edgars Reinholds</b> | SPG Status:        | <b>Pending</b>             |
| Fix Version/s:       | <b>[21.03]</b>                 | Designer Contact:     | <b>Michael Barillas</b> | Change Type (SCR): | <b>New Policy</b>          |
| Minor Version:       | <b>21.05.xx</b>                | Expedite Changes:     | <b>Start Build</b>      | Estimate:          | <b>150</b>                 |
| Reporter:            | <b>Ritu Chinya</b>             | Regulation Reference: | <b>TBD</b>              | Created:           | <b>10/16/2020 09:08 AM</b> |
| Status:              | <b>Test Complete</b>           | Impact Analysis:      | <b>[N/A]</b>            | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Caroline Bui</b>            | Training Impacted:    |                         | Funding Source:    | <b>C-IV M&amp;O</b>        |
| Consortium Contact:  |                                | Migration Impact:     | <b>No</b>               | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Production</b>              | Approved by           |                         | Other Agency Cross | <b>CA-219543</b>           |
| Committee:           | <b>[CaWORKs/<br/>CalFresh]</b> | Committee:            |                         | Reference:         |                            |

## Non-Committee

### Review:

**Expedite Approval:** Approved by Michele Peterson on 12/3/2020.

**Current Design:** SSI/SSP assistance is not automatically updated when the Social Security Administration (SSA) Cost of Living Adjustments (COLA) changes are applied to the Systems.

**Request:** This SCR is to test a proof of concept with MEDS to prepare for the CalFresh SSA COLA which has been deferred to March 2022.

The Systems will generate and send a file to MEDS containing CalFresh persons receiving SSI or SSI/SSP Income. After sending the file, MEDS will provide a one-time response file that includes elements in the initial outbound file, as well as additional SSI and/or SSP payment amounts. CalSAWS will process the inbound file and update OPA records with the new SSI or SSI/SSP amounts. CalSAWS will generate an exceptions list containing records that could not be processed.

### Recommendation:

For testing purposes only:

1. Create a one-time outbound file for CalFresh persons receiving SSI or SSI/SSP Income and send to MEDS.
2. Process a one-time Inbound MEDS SSI/SSP COLA Response File containing the data in the CalSAWS outbound file as well as additional SSI and/or SSP Payment Amounts.
3. Create an exceptions list for all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

Note: The file will not be implemented in Production at this time. This effort is only to test the proof of concept and validate the data exchanged with MEDS. Production effort is deferred until March 2022.

## Outreach

### Description:

**Migration Impact Description:** This SCR will generate a one-time outbound file.

### Migration Impact

### Description:

### Analysis:

### Alternative

N/A - Test only

### Procedure

### Description:

### Operational Impact:

**Estimate:** 150

|                       |   |                    |     |                         |   |
|-----------------------|---|--------------------|-----|-------------------------|---|
| Automated Test :      | 0 | Batch/Interfaces : | 150 | Batch Operations :      | 0 |
| CalHEERS :            | 0 | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                 | 0 | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :              | 0 | Imaging :          | 0   | IVR/CC :                | 0 |
| Online :              | 0 | Performance :      | 0   | Release Communication   | 0 |
| Reports :             | 0 | Reports Test :     | 0   | Support :               | 0 |
| System Test Support : | 0 | Tech Arch :        | 0   | Security :              | 0 |
| Training :            | 0 | Translation :      | 0   | Tech Ops :              | 0 |

**Content Revision  
Status-1:**

Pending CCB

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before: No recommendation #2.b.5 in Section 2.2.2  
After: Added recommendation #2.b.5 in Section 2.2.2

2. Estimate Change: N/A

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:



# [CIV-108368] CIV-107763: Online Help - OLH Updates to support the Case Data Removal Functionality

- Resolved: 04/12/2021 09:40 AM

|                                   |                        |                        |                        |                               |                            |
|-----------------------------------|------------------------|------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Training</b>        | Assignee:              | <b>Melita Dennis</b>   | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.05]</b>         | Designer Contact:      | <b>Cristina Garcia</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.22</b>        | Expedite Changes:      | <b>Start Build</b>     | Estimate:                     | <b>15</b>                  |
| Reporter:                         | <b>Cristina Garcia</b> | Regulation Reference:  |                        | Created:                      | <b>12/05/2020 10:27 PM</b> |
| Status:                           | <b>In Production</b>   | Impact Analysis:       | <b>[Training]</b>      | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Frederick Gains</b> | Training Impacted:     | <b>[Online Help]</b>   | Funding Source:               | <b>C-IV M&amp;O</b>        |
| Project Phase (SCR):              | <b>Production</b>      | Migration Impact:      | <b>No</b>              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>         | Approved by Committee: |                        | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Joyce Oshiro 12/07/2020 - Approve

**Expedite Approval:** Approved by Karen Rapponotti on 1/5/2021

**Current Design:** SCR CIV-107763 creates a Case Data Removal process to identify and remove cases through a Batch process following PSC-approved records retention policies. As part of this effort, the following SCRs implemented changes:  
 SCR CIV-107924 updated the Case Summary page. It also created the Case Data Removal Override page and Case Data Removal Override Report.  
 SCR CIV-108106 updated updated the Case Data Removal Detail page.

**Request:** Update the Online Help for these SCRs.

**Recommendation:** Update the following in Online Help:  
 1) Update the Case Summary page  
 2) Create the Case Data Removal Detail page  
 3) Add the Case Data Removal Override Report to the Reports Overview

**Outreach**

**Description:** This functionality is for C-IV only.

**Migration Impact Description:** No Impact

**Analysis:** None

**Alternative Procedure**

**Description:**

**Operational Impact:** Estimate: **15**

|                       |    |                    |   |                                 |   |
|-----------------------|----|--------------------|---|---------------------------------|---|
| Automated Test :      | 0  | Batch/Interfaces : | 0 | Batch Operations :              | 0 |
| CalHEERS :            | 0  | CalHEERS Test :    | 0 | Client Correspondence :         | 0 |
| DBA :                 | 0  | Design :           | 0 | Eligibility :                   | 0 |
| Fiscal :              | 0  | Imaging :          | 0 | IVR/CC :                        | 0 |
| Online :              | 0  | Performance :      | 0 | Release Communication Support : | 0 |
| Reports :             | 0  | Reports Test :     | 0 | Security :                      | 0 |
| System Test Support : | 0  | Tech Arch :        | 0 | Tech Ops :                      | 0 |
| Training :            | 15 | Translation :      | 0 |                                 |   |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: N/A

- 2. Estimate Change: N/A
- 3. Release Change:  
Before: 21.05  
After:21.03
- 4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

- 1. Recommendation Change:  
Before:  
After:
- 2. Estimate Change:  
Before:  
After:
- 3. Release Change:  
Before:  
After:
- 4. Funding Source Change:  
Before:  
After:

**End Content Revisions**



# [CA-215013] DDID 2589 FDS: Non State Forms - Threshold Languages - Add State Form GEN 107 (ADM 107)

|                                   |                              |                                  |                                 |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Indira Ramasamy</b>          | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>                 | Designer Contact:                | <b>Suresh Mullaguri</b>         | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.03.x5</b>              | Expedite Changes:                | <b>Start Build</b>              | Estimate:                     | <b>35</b>                  |
| Reporter:                         | <b>Lynnel Silva</b>          | Regulation Reference:            |                                 | Created:                      | <b>04/02/2020 04:58 PM</b> |
| Status:                           | <b>System Test</b>           | Impact Analysis:                 | <b>[Forms/NOA Translations]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Maria Arceo</b>           | Training Impacted:               |                                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                | <b>No</b>                       | Funding Source ID:            |                            |
| Committee:                        | <b>[Correspondence]</b>      | Approved by Committee:           |                                 | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Maria Arceo</b>           | Consortium Review Approval Date: | <b>04/12/2021</b>               |                               |                            |

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 04/13/2021

### Current Design:

GEN 107- Message From Your Worker form is available in English and Spanish Languages in current CalSAWS Template Repository.

### Request:

- 1) Add State Form GEN 107- Message From Your Worker in the threshold languages. (See attached ENG form)
- 2) This form replaces the ADM 107 - Message From Your Worker for migration.
- 3) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

### Recommendation:

- 1) Add State Form GEN 107- Message From Your Worker in the threshold languages. (See attached ENG form)
- 2) This form replaces the ADM 107 - Message From Your Worker for migration.
- 3) This form will be available in the Template Repository in all threshold languages, including.
  - Arabic
  - Armenian
  - Cambodian
  - Cantonese
  - Chinese
  - Farsi
  - Hmong
  - Korean
  - Lao
  - Other Chinese Language
  - Russian
  - Tagalog
  - Vietnamese

### Outreach

### Description:

NA

**Migration Impact Description:** Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

**Migration Impact Analysis:**

**Alternative Procedure:** NA

**Description: Operational Impact Estimate:**

35

|                                 |   |                    |    |                         |   |
|---------------------------------|---|--------------------|----|-------------------------|---|
| Automated Test :                | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0 |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0 |
| DBA :                           | 0 | Design :           | 35 | Eligibility :           | 0 |
| Fiscal :                        | 0 | Forms Test :       | 0  | Imaging :               | 0 |
| IVR/CC :                        | 0 | Online :           | 0  | Performance :           | 0 |
| Release Communication Support : | 0 | Reports :          | 0  | Reports Test :          | 0 |
| Security :                      | 0 | Special Project :  | 0  | System Test Support :   | 0 |
| Tech Arch :                     | 0 | Tech Ops :         | 0  | Training :              | 0 |
| Translation :                   | 0 |                    |    |                         |   |

 **[CA-215821] Add the EBT 2216 in threshold languages**

|   |   |                                  |                                 |                               |                            |
|---|---|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Client Correspondence</b>  | Assignee:                        | <b>Nisarga Nagarathnaraj</b>    | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                            | <b>[RWR]</b>  | Designer Contact:                | <b>Maria Jensen</b>             | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                            | <b>21.03.x5</b>   | Expedite Changes:                | <b>Start Build</b>              | Estimate:                     | <b>219</b>                 |
| Reporter:                                 | <b>Rainier Dela Cruz</b>  | Regulation Reference:            |                                 | Created:                      | <b>04/22/2020 05:30 PM</b> |
| Status:                                   | <b>System Test</b>  | Impact Analysis:                 | <b>[Forms/NOA Translations]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Caroline Bui</b>   | Training Impacted:               |                                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):                      | <b>Production</b>   | Migration Impact:                | <b>No</b>                       | Funding Source ID:            |                            |
| Committee:                                | <b>[Correspondence]</b>   | Approved by Committee:           |                                 | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               | <b>Caroline Bui</b>   | Consortium Review Approval Date: | <b>03/23/2021</b>               |                               |                            |
| <b>Non-Committee Review:</b>              | Caroline Bui--Approved 3/23/2021  |                                  |                                 |                               |                            |
| <b>Expedite Approval:</b>                 | JoAnne Osborn - 03/25/2021  |                                  |                                 |                               |                            |
| <b>Current Design:</b>                    | CA-215513 DDID 1967 added the EBT 2216 to LRS/CalSAWS in English and Spanish with the version date of 03/19.  |                                  |                                 |                               |                            |
| <b>Request:</b>                           | Add the EBT 2216 in threshold languages.  |                                  |                                 |                               |                            |
| <b>Recommendation:</b>                    | Add the EBT 2216 in threshold languages: Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Tagalog, and Vietnamese.   |                                  |                                 |                               |                            |
| <b>Outreach Description:</b>              |   |                                  |                                 |                               |                            |
| <b>Migration Impact Description:</b>      | Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration. |                                  |                                 |                               |                            |
| <b>Migration Impact Analysis:</b>         |   |                                  |                                 |                               |                            |
| <b>Alternative Procedure Description:</b> | N/A - CalSAWS DD&I Requirement  |                                  |                                 |                               |                            |
| <b>Operational Impact: Estimate:</b>      | <b>219</b>  |                                  |                                 |                               |                            |
| Automated Test :                          | 0   | Batch/Interfaces :               | 0                               | Batch Operations :            | 0                          |
| CalHEERS :                                | 0   | CalHEERS Test :                  | 0                               | Client Correspondence :       | 157                        |
| DBA :                                     | 0   | Design :                         | 0                               | Eligibility :                 | 0                          |
| Fiscal :                                  | 0   | Forms Test :                     | 62                              | Imaging :                     | 0                          |
| IVR/CC :                                  | 0   | Online :                         | 0                               | Performance :                 | 0                          |
| Release Communication Support :           | 0   | Reports :                        | 0                               | Reports Test :                | 0                          |
| Security :                                | 0   | Special Project :                | 0                               | System Test Support :         | 0                          |
| Tech Arch :                               | 0   | Tech Ops :                       | 0                               | Training :                    | 0                          |
| Translation :                             | 0   |                                  |                                 |                               |                            |

 **[CA-218759] Update NA 820 and NA 821 with updates from CDSS**

|   |   |                                  |                           |                               |                            |
|---|---|----------------------------------|---------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Client Correspondence</b>  | Assignee:                        | <b>Manisha Chatterjee</b> | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:                            | <b>[RWR]</b>  | Designer Contact:                | <b>Raj Devidi</b>         | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                            | <b>21.03.x5</b>   | Expedite Changes:                | <b>No</b>                 | Estimate:                     | <b>240</b>                 |
| Reporter:                                 | <b>Amy Gill</b>   | Regulation Reference:            |                           | Created:                      | <b>08/17/2020 02:03 PM</b> |
| Status:                                   | <b>System Test</b>  | Impact Analysis:                 | <b>[N/A]</b>              | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Gingko Luna</b>  | Training Impacted:               |                           | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Migration</b>  | Migration Impact:                | <b>No</b>                 | Funding Source ID:            |                            |
| Committee:                                | <b>[Other]</b>  | Approved by Committee:           |                           | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               | <b>Gingko Luna</b>  | Consortium Review Approval Date: | <b>03/11/2021</b>         |                               |                            |
| <b>Non-Committee Review:</b>              | Gingko Luna   |                                  |                           |                               |                            |
| <b>Expedite Approval:</b>                 |   |                                  |                           |                               |                            |
| <b>Current Design:</b>                    | The NA 820 Transportation Approval NOA and NA 821 Transportation Discontinuance NOA is under review by CDSS and advocates.  |                                  |                           |                               |                            |
| <b>Request:</b>                           | Update the NA 820 and NA 821 forms based on latest direction from CDSS.<br>All fields should be editable when generated from the Template Repository or Generate Form button on the Service Arrangement Detail page.<br>Update variable prepopulation for Spanish to populate in Spanish for the NA 820 |                                  |                           |                               |                            |
| <b>Recommendation:</b>                    | Update NA 820 and NA 821 with latest version from CDSS and update variable population on NA 820.  |                                  |                           |                               |                            |
| <b>Outreach Description:</b>              |   |                                  |                           |                               |                            |
| <b>Migration Impact Description:</b>      | Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.   |                                  |                           |                               |                            |
| <b>Migration Impact Analysis:</b>         |   |                                  |                           |                               |                            |
| <b>Alternative Procedure Description:</b> | N/A - CalSAWS DD&I Requirement  |                                  |                           |                               |                            |
| <b>Operational Impact Estimate:</b>       | <b>240</b>  |                                  |                           |                               |                            |
| Automated Test :                          | 0   | Batch/Interfaces :               | 0                         | Batch Operations :            | 0                          |
| CalHEERS :                                | 0   | CalHEERS Test :                  | 0                         | Client Correspondence :       | 200                        |
| DBA :                                     | 0   | Design :                         | 0                         | Eligibility :                 | 0                          |
| Fiscal :                                  | 0   | Forms Test :                     | 40                        | Imaging :                     | 0                          |
| IVR/CC :                                  | 0   | Online :                         | 0                         | Performance :                 | 0                          |
| Release Communication Support :           | 0   | Reports :                        | 0                         | Reports Test :                | 0                          |
| Security :                                | 0   | Special Project :                | 0                         | System Test Support :         | 0                          |
| Tech Arch :                               | 0   | Tech Ops :                       | 0                         | Training :                    | 0                          |
| Translation :                             | 0   |                                  |                           |                               |                            |



# [CA-215122] DDID 2644 FDS: Non State Forms - Add New State Form CR 6181

- Resolved: 04/22/2021 10:30 PM

|                                   |                              |                                  |                                 |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>prajwal honneshappa</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.03]</b>               | Designer Contact:                | <b>Harish Katragadda</b>        | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.27</b>              | Expedite Changes:                | <b>Start Build</b>              | Estimate:                     | <b>22</b>                  |
| Reporter:                         | <b>Lynnel Silva</b>          | Regulation Reference:            |                                 | Created:                      | <b>04/02/2020 04:58 PM</b> |
| Status:                           | <b>In Production</b>         | Impact Analysis:                 | <b>[Forms/NOA Translations]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Maria Arceo</b>           | Training Impacted:               |                                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                | <b>No</b>                       | Funding Source ID:            |                            |
| Committee:                        | <b>[Correspondence]</b>      | Approved by Committee:           |                                 | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Maria Arceo</b>           | Consortium Review Approval Date: | <b>02/09/2021</b>               |                               |                            |

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti - 2/16/2021

**Current Design:** State form CR 6181 (11/2020) is currently not available in CalSAWS Template Repository.

**Request:** Add State form CR 6181 (11/2020) Interpreter Services Statement and Confidentiality Agreement Form to CalSAWS Template Repository in English and Spanish and make it available to all 58 counties.

**Recommendation:**

- 1) Add new State form CR 6181 (11/2020) - Interpreter Services Statement and Confidentiality Agreement, based on the Fresno 2229 Client Waiver of Free Interpretation Services
- 2) Make the form available in the Template Repository for all 58 Counties with the CalSAWS standard header information in English and Spanish

## Outreach

### Description:

**Migration Impact Description:** Per strategic direction for migration, there will be a single set of State and Non-State forms. The 57 migration counties will be adopting this functionality as part of migration.

## Migration Impact

### Analysis:

**Alternative Procedure Description:** N/A

## Operational Impact:

**Estimate:** **22**

|                                 |   |                    |    |                         |   |
|---------------------------------|---|--------------------|----|-------------------------|---|
| Automated Test :                | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0 |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0 |
| DBA :                           | 0 | Design :           | 22 | Eligibility :           | 0 |
| Fiscal :                        | 0 | Forms Test :       | 0  | Imaging :               | 0 |
| IVR/CC :                        | 0 | Online :           | 0  | Performance :           | 0 |
| Release Communication Support : | 0 | Reports :          | 0  | Reports Test :          | 0 |
| Security :                      | 0 | Special Project :  | 0  | System Test Support :   | 0 |
| Tech Arch :                     | 0 | Tech Ops :         | 0  | Training :              | 0 |
| Translation :                   | 0 |                    |    |                         |   |



# [CA-217173] DDID 1791: C-IV Migration Batch Regression Test Support SCR

- Resolved: 02/09/2021 03:55 PM

|                                   |                                   |                                  |                                   |                               |                            |
|-----------------------------------|-----------------------------------|----------------------------------|-----------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b>           | Assignee:                        | <b>Naveen Bhumandla</b>           | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.03]</b>                    | Designer Contact:                | <b>Karthikeyan Krishnamoorthy</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.06.11</b>                   | Expedite Changes:                | <b>No</b>                         | Estimate:                     | <b>3255</b>                |
| Reporter:                         | <b>Karthikeyan Krishnamoorthy</b> | Regulation Reference:            |                                   | Created:                      | <b>06/16/2020 04:47 PM</b> |
| Status:                           | <b>System Test</b>                | Impact Analysis:                 | <b>[N/A]</b>                      | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>JoAnne Osborn</b>              | Training Impacted:               | <b>[N/A]</b>                      | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>                  | Migration Impact:                | <b>No</b>                         | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>                    | Approved by Committee:           |                                   | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Approved by JoAnne Osborn.</b> | Consortium Review Approval Date: | <b>07/27/2020</b>                 |                               |                            |

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

The CONTRACTOR shall perform regression tests on all the new Batch Jobs against Converted Data.

#### Approved Assumptions:

- It is assumed regression test will encompass critical Monthly Batch schedules against the CalSAWS Converted Data. This estimate includes 6 monthly schedules which will include 166 distinct critical monthly and daily batch jobs and daily jobs to be run against a testing County which represents each of the 2 consortia's converted data (C-IV and CalWIN).
- Critical Monthly Schedules:
  - First Business day Batch
  - SAR7 Discontinuance
  - MEDS Recon
  - 10-Day Batch
  - Main Payroll
  - End of Month Batch
- The critical batch jobs are those processes related to:
  - ABAWD
  - Auditor Controller
  - Batch Appointments
  - Batch EDBC
  - Batch EDBC Sweeps
  - Batch life cycle jobs
  - CalHEERS EDR/DER
  - Central Print
  - Child Support
  - Claiming
  - DCFS EDBC
  - DCFS General Ledger
  - Direct Deposit
  - EBT
  - EICT
  - FC Main Payroll
  - Form Sweeps
  - GA\Grow related Jobs
  - GR Invoices
  - MEDS
  - MEDS Recon
  - Main Payroll
  - NOA Generation

- NOA/Forms Generation
- QA/QC
- Recovery Account
- Reports
- SAR7
- Super Triggers
- Task sweeps\Generation
- WDTIP
- WPRD
- WTWREP related jobs
- Warrant Print

**Request:** This SCR is to track the C-IV Migration Batch Regression Test Support activities for the Application Development and System Test Teams.

**Recommendation:** N/A - Support SCR Only

**Outreach**

**Description:**

**Migration Impact Description:** No migration impact as this is a support-only SCR and already included within the DD&I scope

**Migration Impact Analysis:** Accounted for in SOR

**Alternative Procedure Description:** N/A

**Operational Impact Estimate:**

**3255**

|                                 |     |                    |      |                         |     |
|---------------------------------|-----|--------------------|------|-------------------------|-----|
| Automated Test :                | 0   | Batch/Interfaces : | 1600 | Batch Operations :      | 380 |
| CalHEERS :                      | 150 | CalHEERS Test :    | 0    | Client Correspondence : | 225 |
| DBA :                           | 0   | Design :           | 0    | Eligibility :           | 0   |
| Fiscal :                        | 250 | Forms Test :       | 0    | Imaging :               | 0   |
| IVR/CC :                        | 0   | Online :           | 0    | Performance :           | 0   |
| Release Communication Support : | 0   | Reports :          | 150  | Reports Test :          | 0   |
| Security :                      | 0   | Special Project :  | 0    | System Test Support :   | 500 |
| Tech Arch :                     | 0   | Tech Ops :         | 0    | Training :              | 0   |
| Translation :                   | 0   |                    |      |                         |     |



# [CA-227170] Event Streaming: Enabling Event Streaming implementation for MEDS EW05 Transactions

- Resolved: 04/15/2021 02:42 PM

|   |  |                                  |                              |                               |                            |
|---|--|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Batch/Interfaces</b>  | Assignee:                        | <b>Angela Zhao</b>           | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:                            | <b>[21.03]</b>   | Designer Contact:                | <b>Balakumar Murthy</b>      | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:                            | <b>21.04.15</b>  | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>15</b>                  |
| Reporter:                                 | <b>Balakumar Murthy</b>  | Regulation Reference:            |                              | Created:                      | <b>04/06/2021 01:20 PM</b> |
| Status:                                   | <b>In Production</b>   | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Laura Chavez</b>  | Training Impacted:               | <b>[N/A]</b>                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Production</b>  | Migration Impact:                | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                                | <b>[Tech]</b>  | Approved by Committee:           | <b>04/15/2021</b>            | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               |  | Consortium Review Approval Date: |                              |                               |                            |
| <b>Non-Committee Review:</b>              | Approved by Jo Anne Osborn on 04/15/2021   |                                  |                              |                               |                            |
| <b>Expedite Approval:</b>                 | Approved by Jo Anne Osborn on 04/15/2021   |                                  |                              |                               |                            |
| <b>Current Design:</b>                    | Current batch architecture to generate EW05 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.  |                                  |                              |                               |                            |
| <b>Request:</b>                           | As part of CA-213976 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed.<br>Since event streaming is working fine now it is safe to turn off EW05 batch and turn on event streaming implementation. |                                  |                              |                               |                            |
| <b>Recommendation:</b>                    | <ol style="list-style-type: none"> <li>1. Turn off existing batch job generating EW05 transaction to MEDS.</li> <li>2. Turn on Event streaming implementation.</li> <li>3. Set the EW05 consumer application as a predecessor to existing MEDS file writer job.</li> </ol>   |                                  |                              |                               |                            |
| <b>Outreach Description:</b>              | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Description:</b>      | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Analysis:</b>         | Not applicable   |                                  |                              |                               |                            |
| <b>Alternative Procedure Description:</b> | Not applicable   |                                  |                              |                               |                            |
| <b>Operational Impact:</b>                | 15   |                                  |                              |                               |                            |
| Automated Test :                          | 0  | Batch/Interfaces :               | 15                           | Batch Operations :            | 0                          |
| CalHEERS :                                | 0  | CalHEERS Test :                  | 0                            | Client Correspondence :       | 0                          |
| DBA :                                     | 0  | Design :                         | 0                            | Eligibility :                 | 0                          |
| Fiscal :                                  | 0  | Forms Test :                     | 0                            | Imaging :                     | 0                          |
| IVR/CC :                                  | 0  | Online :                         | 0                            | Performance :                 | 0                          |
| Release Communication Support :           | 0  | Reports :                        | 0                            | Reports Test :                | 0                          |
| Security :                                | 0  | Special Project :                | 0                            | System Test Support :         | 0                          |
| Tech Arch :                               | 0  | Tech Ops :                       | 0                            | Training :                    | 0                          |
| Translation :                             | 0  |                                  |                              |                               |                            |



## [CA-227176] Issue April 2021 Disaster Supplement in accordance to HR 6201 Emergency Allotments

|                                   |                             |                                  |                                   |                               |                            |
|-----------------------------------|-----------------------------|----------------------------------|-----------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>               | Assignee:                        | <b>Romel Acosta</b>               | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.03]</b>              | Designer Contact:                | <b>Sidhant Garg</b>               | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.05.15</b>             | Expedite Changes:                | <b>Production Deployment</b>      | Estimate:                     | <b>210</b>                 |
| Reporter:                         | <b>Kapil Santosh</b>        | Regulation Reference:            | <b>ACWDL dated April 16, 2021</b> | Created:                      | <b>04/06/2021 02:08 PM</b> |
| Status:                           | <b>In Assembly Test</b>     | Impact Analysis:                 | <b>[N/A]</b>                      | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</b>     | Training Impacted:               | <b>[N/A]</b>                      | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Production</b>           | Migration Impact:                | <b>No</b>                         | Funding Source ID:            |                            |
| Committee:                        | <b>[CalWORKs/ CalFresh]</b> | Approved by Committee:           |                                   | Other Agency Cross Reference: | <b>CIV-108869</b>          |
| Consortium Review Approval:       |                             | Consortium Review Approval Date: |                                   |                               |                            |

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 04/20/2021

#### Current Design:

The CalSAWS System allows the issuance of Disaster CalFresh (CF) supplemental benefits. When Disaster Services are enabled for a County, staff can:

- 1) Issue Disaster Services pre-embossed EBT cards provided by the EBT Vendor.
- 2) Issue Disaster Benefits by running a Manual EDBC with a run reason of DCFP/Supp-DCFP (Supplemental). These EDBC's are not factored into the previous potential benefit calculations for the benefit month in which they are issued.

#### Request:

CalFresh Emergency allotments have been approved for the State of California due to COVID-19 emergency. The State has received approval to supplement all current CalFresh recipients up to the Maximum Allotment for the February and March 2021 benefit month. CalFresh households will receive a minimum emergency allotment of \$95 per month for the April 2021 benefit month.

#### Recommendation:

- 1) Create a DCR to insert Manual EDBC records for the February 2021 and March 2021 benefit months for all CalFresh and TCF recipients who are Active for the month, have received less than the maximum allotment for their household size, and have not received the Emergency Allotment benefit based on the following conditions:
  - a. Include all cases with Active CalFresh program in February 2021 and March 2021 benefit months and no Emergency Allotment issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount.
  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Include cases that were skipped earlier. Insert a record in ISSUANCE\_TRANSACT for these records.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 2) Create a DCR to insert Manual EDBC records for the April 2021 benefit month for all CalFresh and TCF recipients who are Active for the month based on the following conditions:
  - a. Include all cases with Active CalFresh program in April 2021 and no Emergency Allotment Issued.
  - b. Use the household size from the latest Accepted and Saved Regular EDBC
  - c. Set the Authorized Amount as the difference between Maximum Allotment for a household size excluding unaided household members, and Previous Potential Benefit Amount. If the authorized amount calculated is less than \$95, set the authorized amount to \$95.

Note: If the household has already received CalFresh benefit up to the maximum allotment for April 2021, the authorized amount for the manual EDBC would be set to \$95.

  - d. Exclude any Overpayments from the previous potential benefit calculation.
  - e. Exclude the TCF cases with Overdue recert.
  - f. Create the manual EDBC records with RECALC\_IND = 'N'
- 3) Create a DCR to Insert the Manual EDBC's from Recommendation #1 into Issuance Transact table.

NOTE: Validate FIS has turned on CF03 EBT Benefit Type.

- 4) After the records are inserted into Issuance\_transact table, do a DCR to update the redetermination record (redeter) as 'No Longer Valid' where there is a completed RE date after the benefit month with reason CalFresh restored or Eligible for TCF. The EA payments for these cases are not getting issued as the system looks for incorrect report which is an existing issue and will be handled with CA-55143.
- 5) Do a DCR after the issuances are created to flip the redeter record back to the previous completion reason.
- 6) Create a DCR to update all the Manual EDBC's to Read Only once all the supplemental Issuances are Issued and Claimed.
- 7) Add a Journal Entry with the following description for all the cases identified from the criteria above:

For February 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 05/15/2021 due to COVID-19

Long Description: Per direction from ACWDL dated January 29, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For March 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 05/15/2021 due to COVID-19

Long Description: Per direction from ACWDL dated February 25, 2021, an emergency allotment was issued for the "Benefit Month" benefit month to bring the CalFresh household up to the maximum allowable allotment based on household size

For April 2021 Benefit Months

Filter Type: All

Journal Type: Narrative

Short Description: Emergency Allotment Benefits issued on 05/15/2021 due to COVID-19

Long Description: Per direction from ACWDL dated April 16, 2021, an emergency allotment was issued for the "Benefit Month" benefit month

- 8) Generate a list of the Issuances where the Disaster Supplements were issued. The List will contain the following data elements:
  - a. Case Name
  - b. Case Number
  - c. County Name
  - d. Program
  - e. Benefit Month
  - f. Supp DCF Amount
  - g. Issuance Sub Category
  - h. Availability Date
  - i. Issuance Status
  - j. Payee Name ( the format would be Last Name, First Name)
  - k. Household Size
  - l. Is TCF Benefit
  - m. Unit
  - n. Unit Name
  - o. Office Name
  - p. Worker Name
  - q. Worker Id

NOTE:

1. No NOA's will be sent - the County will utilize media and/or posters in the Reception Lobby to announce potential to Disaster Supplement benefits. Also daily ad-hoc reports will be handled by County Reports Team
2. CF03 will be used as the benefit Type when sending the issuances to FIS.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Joint design has been approved through Non-Committee Review. C-IV will implement this Change with SCR CIV-108869 in the R21.05.15 release.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**210**

|                                 |     |                    |    |                         |    |
|---------------------------------|-----|--------------------|----|-------------------------|----|
| Automated Test :                | 0   | Batch/Interfaces : | 0  | Batch Operations :      | 0  |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0  | Client Correspondence : | 0  |
| DBA :                           | 0   | Design :           | 0  | Eligibility :           | 0  |
| Fiscal :                        | 137 | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0   | Online :           | 0  | Performance :           | 0  |
| Release Communication Support : | 0   | Reports :          | 15 | Reports Test :          | 0  |
| Security :                      | 0   | Special Project :  | 0  | System Test Support :   | 43 |
| Tech Arch :                     | 0   | Tech Ops :         | 0  | Training :              | 0  |
| Translation :                   | 0   |                    |    |                         |    |



# [CA-227183] Event Streaming: Enabling Event Streaming implementation for MEDS FX40 Transactions

- Resolved: 04/29/2021 02:43 PM

|   |  |                                  |                              |                               |                            |
|---|--|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Batch/Interfaces</b>  | Assignee:                        | <b>Angela Zhao</b>           | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:                            | <b>[21.03]</b>   | Designer Contact:                | <b>Balakumar Murthy</b>      | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:                            | <b>21.04.29</b>  | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>15</b>                  |
| Reporter:                                 | <b>Balakumar Murthy</b>  | Regulation Reference:            |                              | Created:                      | <b>04/06/2021 03:04 PM</b> |
| Status:                                   | <b>In Production</b>   | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Laura Chavez</b>  | Training Impacted:               | <b>[N/A]</b>                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Production</b>  | Migration Impact:                | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                                | <b>[Tech]</b>  | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               |  | Consortium Review Approval Date: |                              |                               |                            |
| <b>Non-Committee Review:</b>              | Approved by Laura Chavez on 04/26/2021   |                                  |                              |                               |                            |
| <b>Expedite Approval:</b>                 | Approved by Laura Chavez on 04/26/2021   |                                  |                              |                               |                            |
| <b>Current Design:</b>                    | Current batch architecture to generate FX40 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.  |                                  |                              |                               |                            |
| <b>Request:</b>                           | As part of CA-213979 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed.<br>Since event streaming is working fine now it is safe to turn off FX40 batch and turn on event streaming implementation. |                                  |                              |                               |                            |
| <b>Recommendation:</b>                    | <ol style="list-style-type: none"> <li>1. Turn off existing batch job generating FX40 transaction to MEDS.</li> <li>2. Turn on Event streaming implementation.</li> <li>3. Set the FX40 consumer application as a predecessor to existing MEDS file writer job.</li> </ol>   |                                  |                              |                               |                            |
| <b>Outreach Description:</b>              | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Description:</b>      | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Analysis:</b>         | Not applicable   |                                  |                              |                               |                            |
| <b>Alternative Procedure Description:</b> | Not applicable   |                                  |                              |                               |                            |
| <b>Operational Impact Estimate:</b>       | <b>15</b>  |                                  |                              |                               |                            |
| Automated Test :                          | 0  | Batch/Interfaces :               | 15                           | Batch Operations :            | 0                          |
| CalHEERS :                                | 0  | CalHEERS Test :                  | 0                            | Client Correspondence :       | 0                          |
| DBA :                                     | 0  | Design :                         | 0                            | Eligibility :                 | 0                          |
| Fiscal :                                  | 0  | Forms Test :                     | 0                            | Imaging :                     | 0                          |
| IVR/CC :                                  | 0  | Online :                         | 0                            | Performance :                 | 0                          |
| Release Communication Support :           | 0  | Reports :                        | 0                            | Reports Test :                | 0                          |
| Security :                                | 0  | Special Project :                | 0                            | System Test Support :         | 0                          |
| Tech Arch :                               | 0  | Tech Ops :                       | 0                            | Training :                    | 0                          |
| Translation :                             | 0  |                                  |                              |                               |                            |



# [CA-227184] Event Streaming: Enabling Event Streaming implementation for MEDS FX60 Transactions

- Resolved: 04/29/2021 03:18 PM

|   |  |                                  |                              |                               |                            |
|---|--|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Batch/Interfaces</b>  | Assignee:                        | <b>Angela Zhao</b>           | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:                            | <b>[21.03]</b>   | Designer Contact:                | <b>Balakumar Murthy</b>      | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:                            | <b>21.04.29</b>  | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>15</b>                  |
| Reporter:                                 | <b>Balakumar Murthy</b>  | Regulation Reference:            |                              | Created:                      | <b>04/06/2021 03:06 PM</b> |
| Status:                                   | <b>In Production</b>   | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Laura Chavez</b>  | Training Impacted:               | <b>[N/A]</b>                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Production</b>  | Migration Impact:                | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                                | <b>[Tech]</b>  | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               |  | Consortium Review Approval Date: |                              |                               |                            |
| <b>Non-Committee Review:</b>              | Approved by Laura Chavez on 04/26/2021   |                                  |                              |                               |                            |
| <b>Expedite Approval:</b>                 | Approved by Laura Chavez on 04/26/2021   |                                  |                              |                               |                            |
| <b>Current Design:</b>                    | Current batch architecture to generate FX60 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.  |                                  |                              |                               |                            |
| <b>Request:</b>                           | As part of CA-213979 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed.<br>Since event streaming is working fine now it is safe to turn off FX60 batch and turn on event streaming implementation. |                                  |                              |                               |                            |
| <b>Recommendation:</b>                    | <ol style="list-style-type: none"> <li>1. Turn off existing batch job generating FX60 transaction to MEDS.</li> <li>2. Turn on Event streaming implementation.</li> <li>3. Set the FX60 consumer application as a predecessor to existing MEDS file writer job.</li> </ol>   |                                  |                              |                               |                            |
| <b>Outreach Description:</b>              | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Description:</b>      | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Analysis:</b>         | Not applicable   |                                  |                              |                               |                            |
| <b>Alternative Procedure Description:</b> | Not applicable   |                                  |                              |                               |                            |
| <b>Operational Impact Estimate:</b>       | <b>15</b>  |                                  |                              |                               |                            |
| Automated Test :                          | 0  | Batch/Interfaces :               | 15                           | Batch Operations :            | 0                          |
| CalHEERS :                                | 0  | CalHEERS Test :                  | 0                            | Client Correspondence :       | 0                          |
| DBA :                                     | 0  | Design :                         | 0                            | Eligibility :                 | 0                          |
| Fiscal :                                  | 0  | Forms Test :                     | 0                            | Imaging :                     | 0                          |
| IVR/CC :                                  | 0  | Online :                         | 0                            | Performance :                 | 0                          |
| Release Communication Support :           | 0  | Reports :                        | 0                            | Reports Test :                | 0                          |
| Security :                                | 0  | Special Project :                | 0                            | System Test Support :         | 0                          |
| Tech Arch :                               | 0  | Tech Ops :                       | 0                            | Training :                    | 0                          |
| Translation :                             | 0  |                                  |                              |                               |                            |



# [CA-227190] Event Streaming: Enabling Event Streaming implementation for MEDS HI37 Transactions

- Resolved: 04/15/2021 02:41 PM

|   |  |                                  |                              |                               |                            |
|---|--|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Batch/Interfaces</b>  | Assignee:                        | <b>Angela Zhao</b>           | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:                            | <b>[21.03]</b>   | Designer Contact:                | <b>Balakumar Murthy</b>      | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:                            | <b>21.04.15</b>  | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>15</b>                  |
| Reporter:                                 | <b>Balakumar Murthy</b>  | Regulation Reference:            |                              | Created:                      | <b>04/06/2021 03:11 PM</b> |
| Status:                                   | <b>In Production</b>   | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Laura Chavez</b>  | Training Impacted:               | <b>[N/A]</b>                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Production</b>  | Migration Impact:                | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                                | <b>[Tech]</b>  | Approved by Committee:           | <b>04/15/2021</b>            | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               |  | Consortium Review Approval Date: |                              |                               |                            |
| <b>Non-Committee Review:</b>              | Approved by Jo Anne Osborn on 04/15/2021   |                                  |                              |                               |                            |
| <b>Expedite Approval:</b>                 | Approved by Jo Anne Osborn on 04/15/2021   |                                  |                              |                               |                            |
| <b>Current Design:</b>                    | Current batch architecture to generate HI37 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.  |                                  |                              |                               |                            |
| <b>Request:</b>                           | As part of CA-213979 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed.<br>Since event streaming is working fine now it is safe to turn off HI37 batch and turn on event streaming implementation. |                                  |                              |                               |                            |
| <b>Recommendation:</b>                    | <ol style="list-style-type: none"> <li>1. Turn off existing batch job generating HI37 transaction to MEDS.</li> <li>2. Turn on Event streaming implementation.</li> <li>3. Set the HI37 consumer application as a predecessor to existing MEDS file writer job.</li> </ol>   |                                  |                              |                               |                            |
| <b>Outreach Description:</b>              | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Description:</b>      | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Analysis:</b>         | Not applicable   |                                  |                              |                               |                            |
| <b>Alternative Procedure Description:</b> | Not applicable   |                                  |                              |                               |                            |
| <b>Operational Impact:</b>                | 15   |                                  |                              |                               |                            |
| Automated Test :                          | 0  | Batch/Interfaces :               | 15                           | Batch Operations :            | 0                          |
| CalHEERS :                                | 0  | CalHEERS Test :                  | 0                            | Client Correspondence :       | 0                          |
| DBA :                                     | 0  | Design :                         | 0                            | Eligibility :                 | 0                          |
| Fiscal :                                  | 0  | Forms Test :                     | 0                            | Imaging :                     | 0                          |
| IVR/CC :                                  | 0  | Online :                         | 0                            | Performance :                 | 0                          |
| Release Communication Support :           | 0  | Reports :                        | 0                            | Reports Test :                | 0                          |
| Security :                                | 0  | Special Project :                | 0                            | System Test Support :         | 0                          |
| Tech Arch :                               | 0  | Tech Ops :                       | 0                            | Training :                    | 0                          |
| Translation :                             | 0  |                                  |                              |                               |                            |



# [CA-227191] Event Streaming: Enabling Event Streaming implementation for MEDS HA20 Transactions

- Resolved: 04/29/2021 02:43 PM

|   |  |                                  |                              |                               |                            |
|---|--|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                         | <b>Batch/Interfaces</b>  | Assignee:                        | <b>Angela Zhao</b>           | SPG Status:                   | <b>Select a value</b>      |
| Fix Version/s:                            | <b>[21.03]</b>   | Designer Contact:                | <b>Balakumar Murthy</b>      | Change Type (SCR):            | <b>Data Change</b>         |
| Minor Version:                            | <b>21.04.29</b>  | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>15</b>                  |
| Reporter:                                 | <b>Balakumar Murthy</b>  | Regulation Reference:            |                              | Created:                      | <b>04/06/2021 03:12 PM</b> |
| Status:                                   | <b>In Production</b>   | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact:         | <b>Laura Chavez</b>  | Training Impacted:               | <b>[N/A]</b>                 | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):                      | <b>Production</b>  | Migration Impact:                | <b>No</b>                    | Funding Source ID:            |                            |
| Committee:                                | <b>[Tech]</b>  | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:               |  | Consortium Review Approval Date: |                              |                               |                            |
| <b>Non-Committee Review:</b>              | Approved by Laura Chavez on 04/26/2021   |                                  |                              |                               |                            |
| <b>Expedite Approval:</b>                 | Approved by Laura Chavez on 04/26/2021   |                                  |                              |                               |                            |
| <b>Current Design:</b>                    | Current batch architecture to generate HA20 are based on standalone Java processing with Spring JDBC. The current Batch programs use materialized views and other JDBC queries to determine the data changes made by the online application during the day and process those changes at night during batch.  |                                  |                              |                               |                            |
| <b>Request:</b>                           | As part of CA-213979 the current batch architecture was rearchitected to Event Streaming approach and implemented in production. The event streaming and batch architecture was made to run in parallel and the output was validated and confirmed.<br>Since event streaming is working fine now it is safe to turn off HA20 batch and turn on event streaming implementation. |                                  |                              |                               |                            |
| <b>Recommendation:</b>                    | <ol style="list-style-type: none"> <li>1. Turn off existing batch job generating HA20 transaction to MEDS.</li> <li>2. Turn on Event streaming implementation.</li> <li>3. Set the HA20 consumer application as a predecessor to existing MEDS file writer job.</li> </ol>   |                                  |                              |                               |                            |
| <b>Outreach Description:</b>              | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Description:</b>      | NA   |                                  |                              |                               |                            |
| <b>Migration Impact Analysis:</b>         | Not applicable   |                                  |                              |                               |                            |
| <b>Alternative Procedure Description:</b> | Not applicable   |                                  |                              |                               |                            |
| <b>Operational Impact Estimate:</b>       | <b>15</b>  |                                  |                              |                               |                            |
| Automated Test :                          | 0  | Batch/Interfaces :               | 15                           | Batch Operations :            | 0                          |
| CalHEERS :                                | 0  | CalHEERS Test :                  | 0                            | Client Correspondence :       | 0                          |
| DBA :                                     | 0  | Design :                         | 0                            | Eligibility :                 | 0                          |
| Fiscal :                                  | 0  | Forms Test :                     | 0                            | Imaging :                     | 0                          |
| IVR/CC :                                  | 0  | Online :                         | 0                            | Performance :                 | 0                          |
| Release Communication Support :           | 0  | Reports :                        | 0                            | Reports Test :                | 0                          |
| Security :                                | 0  | Special Project :                | 0                            | System Test Support :         | 0                          |
| Tech Arch :                               | 0  | Tech Ops :                       | 0                            | Training :                    | 0                          |
| Translation :                             | 0  |                                  |                              |                               |                            |



# [CA-223930] Demobilization of Cudahy District #06 & Customer Service Enhancements - Boundaries Modification Project

|                                   |                         |                                  |                           |                               |                                |
|-----------------------------------|-------------------------|----------------------------------|---------------------------|-------------------------------|--------------------------------|
| Team Responsible:                 | <b>CalHEERS</b>         | Assignee:                        | <b>Jarred Stein</b>       | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:                    | <b>[21.05]</b>          | Designer Contact:                | <b>Vallari Bathala</b>    | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:                    | <b>21.06.10</b>         | Expedite Changes:                | <b>Start Build</b>        | Estimate:                     | <b>318</b>                     |
| Reporter:                         | <b>Prem Venugopalan</b> | Regulation Reference:            |                           | Created:                      | <b>01/14/2021 01:31 PM</b>     |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[Business Process]</b> | Outreach Required:            | <b>No</b>                      |
| Policy/Design Consortium Contact: | <b>Ignacio Lazaro</b>   | Training Impacted:               |                           | Funding Source:               | <b>LRS M&amp;E</b>             |
| Project Phase (SCR):              | <b>Production</b>       | Migration Impact:                | <b>No</b>                 | Funding Source ID:            |                                |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                           | Other Agency Cross Reference: |                                |
| Consortium Review Approval:       | <b>iLazaro</b>          | Consortium Review Approval Date: | <b>04/16/2021</b>         |                               |                                |

## Non-Committee

### Review:

**Expedite Approval:** Karen Rapponotti on 04/07/2021

### Current Design:

CalHEERS and eICT Referrals for Los Angeles County are currently assigned to Cudahy, District #06, based on the Office Boundaries table, which includes shape files drawn for each office boundary using a tool outside of CalSAWS. The YBN code detail table contains backup zip code records in the event that GIS fails to locate a valid address in assigning an application to an office.

### Request:

1. Update CalSAWS to reflect the new District Office boundaries for Los Angeles County CalHEERS Referrals and eICT Referrals for CalFresh, Medi-Cal and CalWORKs.
2. Update the following Office Zip code records for YBN in Code Detail table:
  - 90239
  - 90240
  - 90241
  - 90242
  - 90262
  - 90280
  - 91010
  - 91077
  - 91706
  - 91731
  - 91732
  - 91734
  - 91754
  - 91755
  - 91756
  - 91770
  - 91771
  - 91772
  - 91775
  - 91776
  - 91778
  - 91780
  - 91801
  - 91802
  - 91803
  - 91804
  - 91841
  - 91896
  - 91899
3. Update YBN so that customers can no longer select the Cudahy office when submitting their application.

**Recommendation:**

1. Update the Office boundaries table via a DCR with new shapes file for CalWORKs, CalFresh and Medi-Cal Offices.
2. Update YBN Code Detail table with category 16 to match the highlighted records found on the 'YBN Zip Code Office Assignment' spreadsheet.
3. Update the YBN Office table to remove Cudahy so that it no longer displays in the Select Office dropdown on the Send Application page in YBN.

**Outreach**

**Description:**

**Migration Impact**

System specific data change.

**Description:**

**Migration Impact**

No Impact

**Analysis:**

**Alternative**

Programs can be reassigned manually to another office by a worker.

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**318**

|                                 |     |                    |    |                         |    |
|---------------------------------|-----|--------------------|----|-------------------------|----|
| Automated Test :                | 0   | Batch/Interfaces : | 15 | Batch Operations :      | 0  |
| CalHEERS :                      | 120 | CalHEERS Test :    | 40 | Client Correspondence : | 0  |
| DBA :                           | 55  | Design :           | 0  | Eligibility :           | 0  |
| Fiscal :                        | 0   | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0   | Online :           | 18 | Performance :           | 0  |
| Release Communication Support : | 0   | Reports :          | 0  | Reports Test :          | 0  |
| Security :                      | 0   | Special Project :  | 0  | System Test Support :   | 25 |
| Tech Arch :                     | 0   | Tech Ops :         | 0  | Training :              | 0  |
| Translation :                   | 0   |                    |    |                         |    |



# [CA-224045] Code Table 186 (Income Type Code) Updates for C-IV Migration

- Resolved: 04/21/2021 09:34 AM

|                      |  |                       |                              |                    |                            |
|----------------------|--|-----------------------|------------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>   | Assignee:             | <b>Amber Brune</b>           | SPG Status:        | <b>No</b>                  |
| Fix Version/s:       | <b>[21.05]</b>   | Designer Contact:     | <b>Srinivasa Meenavalli</b>  | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:       |  | Expedite Changes:     | <b>Production Deployment</b> | Estimate:          | <b>182</b>                 |
| Reporter:            | <b>Srinivasa Meenavalli</b>                                  | Regulation Reference: |                              | Created:           | <b>01/18/2021 12:01 PM</b> |
| Status:              | <b>Test Complete</b>   | Impact Analysis:      | <b>[N/A]</b>                 | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Prakash Thota</b>   | Training Impacted:    | <b>[N/A]</b>                 | Funding Source:    | <b>LRS M&amp;E</b>         |
| Consortium Contact:  |  | Migration Impact:     | <b>Yes</b>                   | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>   | Approved by           | <b>01/31/0021</b>            | Other Agency Cross |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh, Foster<br/>Care/Kin GAP/AAP]</b> | Committee:            |                              | Reference:         |                            |
| Consortium Review    | <b>iLazaro</b>   | Consortium Review     | <b>02/02/0021</b>            |                    |                            |
| Approval:            |  | Approval Date:        |                              |                    |                            |

**Non-Committee Review:** Sarah Cox, Caroline Bui, Ignacio Lazaro, Elisa Miller

**Expedite Approval:** Approved by Karen Rapponotti on 3/17/2021

**Current Design:** Currently in CalSAWS, specific Income Types are not aligned as per the state and federal regulations and these are being not being evaluated correctly in the budget calculations when compared with the CIV Income Types classifications. This SCR is to align the Income Types in CalSAWS as per the regulations.

**Request:** Align the income types associated to the corresponding program classification in CalSAWS Code Detail Table.

**Recommendation:** Update the Code Detail Table CT186 (Income Type) for the CW, CF, FC and MC Programs classifications in CalSAWS.

Attached is the Design doc for more details.

### Outreach

#### Description:

**Migration Impact Description:** If not implemented, EDBC will evaluate incorrect results for the impacted Income Type Codes.

#### Migration Impact

#### Description:

#### Analysis:

#### Alternative

#### Procedure

#### Description:

Workers must perform override/manual EDBC if the system returns incorrect benefits due to this not being implemented.

#### Operational Impact:

**Estimate: 182**

|                       |   |                    |    |                         |     |
|-----------------------|---|--------------------|----|-------------------------|-----|
| Automated Test :      | 0 | Batch/Interfaces : | 31 | Batch Operations :      | 0   |
| CalHEERS :            | 6 | CalHEERS Test :    | 0  | Client Correspondence : | 0   |
| DBA :                 | 0 | Design :           | 0  | Eligibility :           | 22  |
| Fiscal :              | 0 | Forms Test :       | 0  | Imaging :               | 0   |
| IVR/CC :              | 0 | Online :           | 0  | Performance :           | 0   |
| Release Communication | 0 | Reports :          | 0  | Reports Test :          | 0   |
| Support :             |   | Special Project :  | 0  | System Test Support :   | 108 |
| Security :            | 0 | Tech Ops :         | 0  | Training :              | 0   |
| Tech Arch :           | 0 |                    |    |                         |     |
| Translation :         | 0 |                    |    |                         |     |

# [CA-224584] Code Hierchy CT202 Updates for C-IV Migration

- Resolved: 03/28/2021 12:42 PM

|                                   |                             |                                  |                              |                               |                            |
|-----------------------------------|-----------------------------|----------------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>               | Assignee:                        | <b>Brian Munce</b>           | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.05]</b>              | Designer Contact:                | <b>Srinivasa Meenavalli</b>  | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                             | Expedite Changes:                | <b>Production Deployment</b> | Estimate:                     | <b>125</b>                 |
| Reporter:                         | <b>Srinivasa Meenavalli</b> | Regulation Reference:            |                              | Created:                      | <b>02/02/2021 02:13 PM</b> |
| Status:                           | <b>Test Complete</b>        | Impact Analysis:                 | <b>[N/A]</b>                 | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Prakash Thota</b>        | Training Impacted:               | <b>[N/A]</b>                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>            | Migration Impact:                | <b>Yes</b>                   | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>              | Approved by Committee:           |                              | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Caroline Bui</b>         | Consortium Review Approval Date: | <b>03/16/2021</b>            |                               |                            |

**Non-Committee Review:** Sarah Cox, Caroline Bui, Elisa Miller - 03/17/2021

**Expedite Approval:** Approved by Karen Rapponotti on 3/17/2021

**Current Design:** Currently in CalSAWS, Deemed Sponsor Income and Resource/Property are automated in EDBC budget evaluation but in C-IV, the Deemed Sponsor Property are selected by the user in the Property data collection pages. For CalSAWS, the Sponsor Income and Property are added against the Sponsor person and EDBC will evaluate in the budgeting for the Program Persons but in C-IV, the Deemed Sponsor Property are added for the Program Persons to evaluate in budget calculation.

In C-IV, the rows for the Parent Table CT 202 - Property Category Code (Liquid, Motor Vehicle, Personal, Real) and Child Table CT208 - Property Type Code (Deemed Sponsor - CalFresh, Deemed Sponsor - CalWORKs, Deemed Sponsor - Medi-Cal) exists but not in CalSAWS. These rows need to be inserted in CalSAWS.

**Request:** Allow the workers to view the below Property Types in CalSAWS for the C-IV converted cases after migration. These Property Types should be allowed only for viewing by the workers and system should not allow to create new Property records with these types.

Deemed Sponsor – CalWORKs  
Deemed Sponsor – CalFresh  
Deemed Sponsor – Medi-Cal

The above Property Types are available under the below Property Categories in C-IV and these should be available to view in CalSAWS.

Liquid Property  
Motor Vehicle  
Real Property  
Personal Property

Also, the request is to remove the logic in EDBC to not count the Deemed Sponsor Property records that are entered in the data collection. The workers need to follow the CalSAWS Sponsorship training/job aid instructions on how to enter the Sponsorship details, Income and/or Property.

**Recommendation:** Update the Code Hierarchy Table with the Parent Table CT202 – Property Category Code and Child Table CT208 – Property Type Code combination that are exiting in C-IV but not in CalSAWS.

End date the Sponsor related Code values in the CT208 – Property Type Code.

Update CW/CF EDBC rules/logic to not count the data collection Deemed Sponsor Property records in the CW/CF EDBC budget calculation.

Attached is the Design doc for more details.

**Outreach Description:**

**Migration Impact****Description:**

If not implemented, CIV converted Deemed Sponsor Property data collection records will displayed inaccurate and EDBC will evaluate incorrect results for the Deemed Sponsor Properties in the budgeting.

**Migration Impact****Analysis:****Alternative****Procedure****Description:**

Workers must perform override/manual EDBC if the system returns incorrect benefits due to this not being implemented.

**Operational Impact:****Estimate:****125**

|                                 |   |                    |    |                         |    |
|---------------------------------|---|--------------------|----|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0  |
| DBA :                           | 0 | Design :           | 0  | Eligibility :           | 34 |
| Fiscal :                        | 0 | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :           | 14 | Performance :           | 0  |
| Release Communication Support : | 0 | Reports :          | 0  | Reports Test :          | 0  |
| Security :                      | 0 | Special Project :  | 0  | System Test Support :   | 67 |
| Tech Arch :                     | 0 | Tech Ops :         | 0  | Training :              | 0  |
| Translation :                   | 0 |                    |    |                         |    |



# [CA-226404] DDID 1631: Update the CA 800 ARC report in CalSAWS

|                                   |                               |                                  |                         |                               |                            |
|-----------------------------------|-------------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Analytics</b>              | Assignee:                        | <b>Sonu Kumar Singh</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.05]</b>                | Designer Contact:                | <b>Greg Deogracia</b>   | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.05.xx</b>               | Expedite Changes:                | <b>Start Build</b>      | Estimate:                     | <b>130</b>                 |
| Reporter:                         | <b>Claudia Pinto</b>          | Regulation Reference:            |                         | Created:                      | <b>03/15/2021 10:50 AM</b> |
| Status:                           | <b>Pending Approval</b>       | Impact Analysis:                 | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Claudia Pinto</b>          | Training Impacted:               |                         | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Production</b>             | Migration Impact:                |                         | Funding Source ID:            |                            |
| Committee:                        | <b>[State/Fiscal Reports]</b> | Approved by Committee:           |                         | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                               | Consortium Review Approval Date: |                         |                               |                            |

**Non-Committee Review:** Claudia Pinto 4/12/2021

**Expedite Approval:** Expedited Build Start Approval provided by Karen J. Rapponotti and Laura Chavez on 4/23/2021

**Current Design:** In C-IV ARC is it's own separate program. In CalSAWS ARC is under the Foster Care program with ARC aid codes. The logic of the CA 800 ARC needs to be updated as the replatformed report is not displaying any ARC program

In C-IV, the Adult Relative Caregiver (ARC) is a standalone program, which means it has it's own program code. In CalSAWS however, ARC is not a separate program. Instead it is part of the Foster Care (FC) program with an ARC Aid Code.

**Request:** Modify the logic of the CA 800 ARC report to accurately report ARC program

**Recommendation:** 1. Modification logic for ARC program code which was converted from "AR" in C-IV to be the Foster Care program code "FC" in CalSAWS.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 130**

Continue Ad Hoc Reports

|                                 |   |                    |    |                         |    |
|---------------------------------|---|--------------------|----|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0  |
| DBA :                           | 0 | Design :           | 0  | Eligibility :           | 0  |
| Fiscal :                        | 0 | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :           | 0  | Performance :           | 0  |
| Release Communication Support : | 0 | Reports :          | 68 | Reports Test :          | 62 |
| Security :                      | 0 | Special Project :  | 0  | System Test Support :   | 0  |
| Tech Arch :                     | 0 | Tech Ops :         | 0  | Training :              | 0  |
| Translation :                   | 0 |                    |    |                         |    |



# [CA-206711] CalFresh Cost of Living Adjustment (COLA) NOA Changes

|                                   |                              |                                  |                                 |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Quynh Nguyen</b>             | SPG Status:                   | <b>Pending</b>             |
| Fix Version/s:                    | <b>[21.07]</b>               | Designer Contact:                | <b>Connor Gorry</b>             | Change Type (SCR):            | <b>Policy Re-Design</b>    |
| Minor Version:                    |                              | Expedite Changes:                | <b>Start Build</b>              | Estimate:                     | <b>292</b>                 |
| Reporter:                         | <b>Maria Arceo</b>           | Regulation Reference:            | <b>ACIN X-XX-XX</b>             | Created:                      | <b>02/07/2019 02:55 PM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:                 | <b>[Forms/NOA Translations]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Caroline Bui</b>          | Training Impacted:               |                                 | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                | <b>No</b>                       | Funding Source ID:            |                            |
| Committee:                        | <b>[Correspondence]</b>      | Approved by Committee:           | <b>04/20/2021</b>               | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                              | Consortium Review Approval Date: |                                 |                               |                            |

## Non-Committee

**Review:**

**Expedite Approval:** Karen Rapponotti Approved on 4/26/2021

**Current Design:** Per existing CalSAWS NOA logic, changes unrelated to the Cost-of-Living Adjustment (COLA) may generate a change NOA instead of or in addition to the CF COLA NOA.

**Request:** Update verbiage and triggers for COLA-related CalFresh NOAs.

**Recommendation:**

1. Shelter change NOA should not generate if shelter amount is not changed.
2. Update COLA Change reason verbiage
3. Income Increase, generate income change NOA but suppress COLA NOA
4. Household Size Increase, generate Household Size change NOA but suppress COLA NOA.
5. Income Decrease, suppress income change NOA but generate COLA NOA.
6. Remove COLA verbiage (or not include within new COLA verbiage): "Your new cash aid amount is figured on this page."

## Outreach

**Description:**

**Migration Impact Description:** C-IV and CalWIN counties will inherit functionality.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Suppress Shelter Change NOA, Household Size Increase NOA via manual DCR when there is a CalFresh COLA.

**Operational Impact:**

**Estimate:** **292**

|                                 |   |                    |   |                         |     |
|---------------------------------|---|--------------------|---|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 221 |
| DBA :                           | 0 | Design :           | 0 | Eligibility :           | 0   |
| Fiscal :                        | 0 | Forms Test :       | 0 | Imaging :               | 0   |
| IVR/CC :                        | 0 | Online :           | 0 | Performance :           | 0   |
| Release Communication Support : | 0 | Reports :          | 0 | Reports Test :          | 0   |
| Security :                      | 0 | Special Project :  | 0 | System Test Support :   | 71  |
| Tech Arch :                     | 0 | Tech Ops :         | 0 | Training :              | 0   |
| Translation :                   | 0 |                    |   |                         |     |



# [CA-207283] DDID 1584: Update Collaborator Management and Search in CalSAWS

|                                   |                       |                                  |                       |                               |                            |
|-----------------------------------|-----------------------|----------------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>         | Assignee:                        | <b>Brian Munce</b>    | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>        | Designer Contact:                | <b>Franchine Ninh</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                       | Expedite Changes:                | <b>No</b>             | Estimate:                     | <b>304</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>   | Regulation Reference:            |                       | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>In Development</b> | Impact Analysis:                 | <b>[Other]</b>        | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</b>    | Training Impacted:               | <b>[N/A]</b>          | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>      | Migration Impact:                |                       | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>        | Approved by Committee:           |                       | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Gingko Luna</b>    | Consortium Review Approval Date: | <b>03/30/2021</b>     |                               |                            |

**Non-Committee Review:** Approved 3/30/2021 LunaG

**Expedite Approval:**

**Current Design:**

In CalSAWS, the current design stores collaborators as users in Los Angeles County's Active Directory (AD). When the user's credentials are provisioned through ForgeRock, they are assigned a collaborator flag which ForgeRock uses to identify them as a collaborator and not a staff member. Collaborators can be assigned to manage multiple resources. Collaborators must be on VPN to access the application. Since they log in via ForgeRock, their login experience is identical to staff members. Collaborator Account administration is virtually nonexistent in CalSAWS since AD accounts cannot be managed by the application. This means password resets and account management are not available. The AD information is simply copied into CalSAWS.

**Request:** Update the Resource Detail page to allow for the Migration Counties to provision access for collaborators to resources. Collaborators cannot be stored in the CalSAWS AD because it belongs to Los Angeles County. The page also needs to maintain the additional functionalities that CalSAWS has implemented. Specifically, maintain the many-to-many relationship between collaborators and resources in CalSAWS.

- Recommendation:**
1. Update the Resource Detail page to support the association of Non-Active Directory Collaborators to Resources.
  2. Prevent the ability to associate Active Staff members as Collaborators to a Resource.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** **304**

N/A - CalSAWS DD&I Requirement

|                                 |    |                    |     |                         |    |
|---------------------------------|----|--------------------|-----|-------------------------|----|
| Automated Test :                | 0  | Batch/Interfaces : | 0   | Batch Operations :      | 0  |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0   | Client Correspondence : | 0  |
| DBA :                           | 0  | Design :           | 0   | Eligibility :           | 0  |
| Fiscal :                        | 0  | Forms Test :       | 0   | Imaging :               | 0  |
| IVR/CC :                        | 0  | Online :           | 159 | Performance :           | 0  |
| Release Communication Support : | 0  | Reports :          | 0   | Reports Test :          | 0  |
| Security :                      | 0  | Special Project :  | 0   | System Test Support :   | 70 |
| Tech Arch :                     | 75 | Tech Ops :         | 0   | Training :              | 0  |
| Translation :                   | 0  |                    |     |                         |    |

## [CA-217304] DDID 34 FDS: Task Mgmt - Dashboard Updates

|                                   |                           |                                  |                        |                               |                            |
|-----------------------------------|---------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>            | Assignee:                        | <b>Yang(Lulu) Yang</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>            | Designer Contact:                | <b>Remi Lassiter</b>   | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.08.xx</b>           | Expedite Changes:                | <b>Start Build</b>     | Estimate:                     | <b>465</b>                 |
| Reporter:                         | <b>Gabriel Trejo</b>      | Regulation Reference:            |                        | Created:                      | <b>06/18/2020 05:44 PM</b> |
| Status:                           | <b>Design in Progress</b> | Impact Analysis:                 | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sarah Cox</b>          | Training Impacted:               |                        | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>          | Migration Impact:                |                        | Funding Source ID:            |                            |
| Committee:                        | <b>[Task Management]</b>  | Approved by Committee:           |                        | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Sarah Cox</b>          | Consortium Review Approval Date: | <b>04/20/2021</b>      |                               |                            |

### Non-Committee

- Review:**
- Expedite Approval:** Expedited Start Build approval provided by Karen J. Rapponotti on 4/28/2021
- Current Design:** The Task Management Dashboard provides real-time and historical data on task management and productivity. It consists of four summary sheets and fifteen drill down detail sheets. The dashboard currently filters by and displays information on the Division, Office, and Unit of the task's worker assignment. There is no filter or columns for Bank assignment. The dashboard also displays summary metrics for tasks based on assigned, completed or overdue status. Tasks with a status of "In Process" are not included in the dashboard.
- Request:**
1. Update the dashboard to filter by and report Bank assignments.
  2. Update the dashboard to report tasks with a status of "In Process".
- Recommendation:**
1. Make the following updates to enable the dashboard to filter by and report Bank assignments:
    - a. Add a new Bank filter to the summary Sheets.
    - b. Update the Division, Office and Unit dropdowns to filter by the division, office and unit of a task's assigned bank for tasks that have no worker assigned.
    - c. Add a new Bank column to the detail sheets.
    - d. Update the Division, Office and Unit columns to display the division, office and unit of the task's assigned bank for tasks that have no worker assigned.
  2. Make the following updates to enable the dashboard to report tasks with a status of "In Process":
    - a. Update all instances of "Assigned Tasks" to be inclusive of data with a status of "Assigned" or "In Process".
      - i. Update the labeling of these instances from "Assigned" to "Open".
    - b. Update all instances of "Overdue Tasks" to be inclusive of tasks with a status of "Assigned" or "In Process" that are overdue.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 465**

|                  |   |                    |    |                         |   |
|------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0 |
| CalHEERS :       | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0 |
| DBA :            | 0 | Design :           | 65 | Eligibility :           | 0 |
| Fiscal :         | 0 | Forms Test :       | 0  | Imaging :               | 0 |

---

|                                 |    |                   |     |                       |     |
|---------------------------------|----|-------------------|-----|-----------------------|-----|
| IVR/CC :                        | 0  | Online :          | 0   | Performance :         | 0   |
| Release Communication Support : | 20 | Reports :         | 280 | Reports Test :        | 100 |
| Security :                      | 0  | Special Project : | 0   | System Test Support : | 0   |
| Tech Arch :                     | 0  | Tech Ops :        | 0   | Training :            | 0   |
| Translation :                   | 0  |                   |     |                       |     |



# [CA-219117] CalSAWS database parameter changes in preparation for CIV cutover

|                                   |                         |                                  |                            |                               |                                |
|-----------------------------------|-------------------------|----------------------------------|----------------------------|-------------------------------|--------------------------------|
| Team Responsible:                 | <b>DBA</b>              | Assignee:                        | <b>Marcelo Burgoa</b>      | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:                | <b>Marcelo Burgoa</b>      | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>                  | Estimate:                     | <b>80</b>                      |
| Reporter:                         | <b>Sauvik Basu</b>      | Regulation Reference:            |                            | Created:                      | <b>08/26/2020 09:01 AM</b>     |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[Technology Impact]</b> | Outreach Required:            | <b>No</b>                      |
| Policy/Design Consortium Contact: | <b>Grady Howe</b>       | Training Impacted:               | <b>[N/A]</b>               | Funding Source:               | <b>LRS M&amp;O</b>             |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                | <b>No</b>                  | Funding Source ID:            |                                |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                            | Other Agency Cross Reference: |                                |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                            |                               |                                |

**Non-Committee Review:** Approved on Apr 12, 2021 per email from Laura Chavez.

**Expedite Approval: Current Design:** CalSAWS DB has MAX\_STRING\_SIZE=STANDARD and 50 VARCHAR2 columns which are lower than the value C-IV has.

**Request:** Update CalSAWS DB to be able to accommodate larger C-IV columns during CIV cutover.

**Recommendation:** Set CalSAWS DB MAX\_STRING\_SIZE=EXTENDED and change the identified 50 VARCHAR2 columns to match the C-IV value.

**Outreach**

**Description:** Migration Impact Description: No migration impact as this is a technical change to support migration.

**Migration Impact Analysis:** Alternative Procedure Description: N/A - CalSAWS DD&I Requirement

**Operational Impact: Estimate:** 80

|                                 |    |                    |   |                         |   |
|---------------------------------|----|--------------------|---|-------------------------|---|
| Automated Test :                | 0  | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0 | Client Correspondence : | 0 |
| DBA :                           | 80 | Design :           | 0 | Eligibility :           | 0 |
| Fiscal :                        | 0  | Forms Test :       | 0 | Imaging :               | 0 |
| IVR/CC :                        | 0  | Online :           | 0 | Performance :           | 0 |
| Release Communication Support : | 0  | Reports :          | 0 | Reports Test :          | 0 |
| Security :                      | 0  | Special Project :  | 0 | System Test Support :   | 0 |
| Tech Arch :                     | 0  | Tech Ops :         | 0 | Training :              | 0 |
| Translation :                   | 0  |                    |   |                         |   |



# [CA-223936] DDID 1629 FDS: Task Mgt - Automated Actions for CSC Tasks

|                      |                          |                       |                          |                    |                            |
|----------------------|--------------------------|-----------------------|--------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Online</b>            | Assignee:             | <b>Justin Concepcion</b> | SPG Status:        | <b>No</b>                  |
| Fix Version/s:       | <b>[21.07]</b>           | Designer Contact:     | <b>Justin Dobbs</b>      | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:       |                          | Expedite Changes:     | <b>Start Build</b>       | Estimate:          | <b>127</b>                 |
| Reporter:            | <b>Gabriel Trejo</b>     | Regulation Reference: |                          | Created:           | <b>01/14/2021 02:38 PM</b> |
| Status:              | <b>In Development</b>    | Impact Analysis:      | <b>[N/A]</b>             | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Sarah Cox</b>         | Training Impacted:    |                          | Funding Source:    | <b>CalSAWS DD&amp;I</b>    |
| Consortium Contact:  |                          | Migration Impact:     |                          | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>         | Approved by           |                          | Other Agency Cross |                            |
| Committee:           | <b>[Task Management]</b> | Committee:            |                          | Reference:         |                            |
| Consortium Review    | <b>Sarah Cox</b>         | Consortium Review     | <b>04/15/2021</b>        |                    |                            |
| Approval:            |                          | Approval Date:        |                          |                    |                            |

### Non-Committee

#### Review:

**Expedite Approval:** 4/15/2021 - Karen Rapponotti

#### Current Design:

The CalSAWS System includes functionality to create tasks in an automated fashion via the nightly batch processes or by specific worker actions. SCR CA-214928 for DDID 34 includes recommendations to introduce Automated Action functionality as part of the Unified Task Management solution. This framework allows a level of configuration for automated tasks that can be maintained by the counties.

DDID 1629 has been phasing CalSAWS automated tasks into the Automated Action framework. A population of Task Types are considered System Tasks, which are tied to specific processing in the CalSAWS System. CSC Category Task Types are considered System Tasks.

#### Request:

Update Task Types with a Category of CSC to be read only as they are considered system tasks. The intent of configurability restriction is to prevent any disruption to existing processing logic for these specific Tasks.

#### Recommendation:

Update non-custom CSC Category Task Types to be read only.

#### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate:** 127

|                       |   |                    |    |                         |    |
|-----------------------|---|--------------------|----|-------------------------|----|
| Automated Test :      | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0  |
| CalHEERS :            | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0  |
| DBA :                 | 0 | Design :           | 0  | Eligibility :           | 0  |
| Fiscal :              | 0 | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :              | 0 | Online :           | 97 | Performance :           | 0  |
| Release Communication | 0 | Reports :          | 0  | Reports Test :          | 0  |
| Support :             |   | Special Project :  | 0  | System Test Support :   | 30 |
| Security :            | 0 | Tech Ops :         | 0  | Training :              | 0  |
| Tech Arch :           | 0 |                    |    |                         |    |
| Translation :         | 0 |                    |    |                         |    |

## [CA-225547] Update CalSAWS Email architecture to use Email API

|                                   |                         |                                  |                            |                               |                                |
|-----------------------------------|-------------------------|----------------------------------|----------------------------|-------------------------------|--------------------------------|
| Team Responsible:                 | <b>Tech Arch</b>        | Assignee:                        | <b>Abel Lopez</b>          | SPG Status:                   | <b>Select a value</b>          |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:                | <b>Sumeet Patil</b>        | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>                  | Estimate:                     | <b>650</b>                     |
| Reporter:                         | <b>Sumeet Patil</b>     | Regulation Reference:            |                            | Created:                      | <b>02/22/2021 08:14 PM</b>     |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[Technology Impact]</b> | Outreach Required:            | <b>No</b>                      |
| Policy/Design Consortium Contact: | <b>David Bruhn</b>      | Training Impacted:               |                            | Funding Source:               | <b>CalSAWS DD&amp;I</b>        |
| Project Phase (SCR):              | <b>Production</b>       | Migration Impact:                | <b>No</b>                  | Funding Source ID:            |                                |
| Committee:                        | <b>[Tech]</b>           | Approved by Committee:           |                            | Other Agency Cross Reference: |                                |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                            |                               |                                |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** In CalSAWS, outbound emails are sent to the users and customers. The email architecture uses JMS queues and Microsoft Graph API to send out emails.

**Request:** Update email architecture to remove dependency on WebLogic JMS queues and Microsoft Graph API.

- Recommendation:**
1. Update Email architecture to replace WebLogic JMS calendar queues with Amazon MQ
  2. Update Email architecture to use CalSAWS Email API, instead of Microsoft Graph API
  3. Update CalSAWS Email API to use Amazon Simple Email Service (SES)
  4. Refactor Undeliverable Email Reader batch process to Amazon Simple Queue Service (SQS) listener

### Outreach

**Description:**  
**Migration Impact Description:** N/A - CalSAWS DD&I

**Migration Impact Analysis:**  
**Alternative Procedure Description:** Keep current email architecture.

**Operational Impact:**  
**Estimate:** **650**

|                                 |     |                    |     |                         |    |
|---------------------------------|-----|--------------------|-----|-------------------------|----|
| Automated Test :                | 0   | Batch/Interfaces : | 250 | Batch Operations :      | 0  |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 0  |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 0  |
| Fiscal :                        | 0   | Forms Test :       | 0   | Imaging :               | 0  |
| IVR/CC :                        | 80  | Online :           | 40  | Performance :           | 0  |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0  |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 80 |
| Tech Arch :                     | 200 | Tech Ops :         | 0   | Training :              | 0  |
| Translation :                   | 0   |                    |     |                         |    |



## [CA-226241] Update Batch EDBC logic so CF and SNB run together for Converted EDBC's

|                                   |                         |                                  |                        |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:                        | <b>Unassigned</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:                | <b>Vallari Bathala</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>              | Estimate:                     | <b>140</b>                 |
| Reporter:                         | <b>Amy Gill</b>         | Regulation Reference:            |                        | Created:                      | <b>03/10/2021 09:47 AM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Caroline Bui</b>     | Training Impacted:               | <b>[Job Aid]</b>       | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                | <b>No</b>              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                        | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Caroline Bui</b>     | Consortium Review Approval Date: | <b>04/19/2021</b>      |                               |                            |

**Non-Committee Review:** Caroline Bui-Approved on 4/19/2021

**Expedite Approval:  
Current Design:**

CalFresh and SNB programs run together in Batch EDBC, so that if CalFresh is discontinued, SNB will also be discontinued.  
Batch EDBC logic has a defined set of EDBC 'Skip' rules and evaluates each targeted program to determine if EDBC should be skipped in batch, so a user can review to resolve any issues and run Online EDBC.  
One such batch EDBC Skip rule prevents EDBC's from running in batch if the latest accepted and saved EDBC has a source of 'Conversion'. In most circumstances, it is generally considered safest to require a user to inspect converted cases and run online EDBC prior to allowing batch to automate EDBC's going forward.

There is an exception for the 'Conversion' skip logic, however. If the targeted program is run for a negative action reason, the 'Conversion' skip logic is bypassed to allow batch EDBC to close the program.

**Request:**

In certain scenarios where Batch EDBC is processing CalFresh with a negative action, the corresponding SNB program is excluded from Batch because the latest EDBC Source is Conversion and SNB is not running with a Negative Action. In these cases, the negative action reason only applies to the triggered CF program, and is not extended to the SNB program. SNB is supposed to close if CF is closed by EDBC. Allowing CF EDBC to run and close in Batch without allowing SNB to run as well causes a status misalignment between CF and SNB.

Update batch EDBC skip logic so that SNB programs are not skipped for converted EDBC's if the SNB program is being run as a consequence of a CF negative action trigger.

**Recommendation:**

Update Batch EDBC logic to disregard the 'Conversion' skip rule for the SNB program when all of the following conditions are true:

- 1) The SNB program is included in the Batch EDBC run because the CF program was triggered to run batch EDBC in 'Targeted Program' or 'All Program' modes
- 2) The CF program is specified to run for any negative action reason

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV and CalWIN counties will inherit functionality.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Manually process the SNB program if the corresponding CalFresh is closed by EDBC due to Negative Action.

**Operational Impact:**

**Estimate:** 140

|                  |   |                    |    |                         |   |
|------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 90 | Batch Operations :      | 0 |
| CalHEERS :       | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0 |

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|                                 |   |                   |   |                       |    |
|---------------------------------|---|-------------------|---|-----------------------|----|
| DBA :                           | 0 | Design :          | 0 | Eligibility :         | 0  |
| Fiscal :                        | 0 | Forms Test :      | 0 | Imaging :             | 0  |
| IVR/CC :                        | 0 | Online :          | 0 | Performance :         | 0  |
| Release Communication Support : | 5 | Reports :         | 0 | Reports Test :        | 0  |
| Security :                      | 0 | Special Project : | 0 | System Test Support : | 40 |
| Tech Arch :                     | 0 | Tech Ops :        | 0 | Training :            | 0  |
| Translation :                   | 0 |                   |   |                       |    |



# [CA-226242] Update Batch EDBC logic for Automated Administrative MAGI MC Renewals to no longer exclude converted EDBC

|                                   |                         |                                  |                        |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:                        | <b>Unassigned</b>      | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:                | <b>Vallari Bathala</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>              | Estimate:                     | <b>97</b>                  |
| Reporter:                         | <b>Amy Gill</b>         | Regulation Reference:            |                        | Created:                      | <b>03/10/2021 09:51 AM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Maureen Votta</b>    | Training Impacted:               | <b>[N/A]</b>           | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                | <b>No</b>              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                        | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                        |                               |                            |

**Non-Committee Review:** DD&I requirement for CalSAWS approved by MVotta

**Expedite Approval: Current Design:**

CalSAWS runs programs via automated EDBC (batch EDBC) when programs are triggered based on a multitude of scenarios. One scenario is the monthly 'Automated Administrative MAGI Med-Cal Renewal' batch job (PB00E120). This job triggers Med-Cal (MC) programs that have been processed via the CalHEERS interface for automated renewal. When the Determination of Eligibility Response (DER) is received from CalHEERS, CalSAWS runs the MC program via Batch EDBC to advance the RE date. This automated process prevents a lot of manual effort for the County Eligibility Workers (EW) each month.

Batch EDBC logic has a defined set of EDBC 'Skip' rules and evaluates each targeted program to determine if EDBC should be skipped in batch, so an EW can review to resolve any issues and run Online EDBC. One such batch EDBC Skip rule prevents EDBCs from running in batch if the latest accepted and saved EDBC has a source of 'Conversion'. In most circumstances, it is generally considered safest to require EWs to inspect converted cases and run online EDBC prior to allowing batch to automate EDBCs going forward.

**Request:** For the monthly 'Automated Administrative MAGI Med-Cal Renewal' batch process, migration County EWs will have to manually process each program that skips in batch due to the 'Conversion' batch EDBC skip logic.

Prevent additional workload for the migration Counties' EWs by allowing batch EDBC to process converted MC cases that are targeted for 'Automated Administrative MAGI Med-Cal Renewal' batch.

**Recommendation:**

Update batch EDBC logic to disregard the 'Conversion' skip rule if the MC program is targeted to run via batch EDBC for the 'Automated Administrative MAGI Med-Cal Renewal' reason for the 39 C-IV Migration Counties only.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

This change to be completed in CalSAWS, so that at migrations, the CIV and CalWIN county's cases marked converted will run through Automated Administration MAGI Medi-Cal Renewals.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

Manually run batch EDBC for the 'Automated Administrative MAGI Med-Cal Renewal' reason.

**Operational Impact:**

**Estimate:**

**97**

|                  |   |                    |    |                         |   |
|------------------|---|--------------------|----|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 53 | Batch Operations :      | 0 |
| CalHEERS :       | 0 | CalHEERS Test :    | 40 | Client Correspondence : | 0 |
| DBA :            | 0 | Design :           | 0  | Eligibility :           | 0 |
| Fiscal :         | 0 | Forms Test :       | 0  | Imaging :               | 0 |

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|                       |   |                   |   |                       |   |
|-----------------------|---|-------------------|---|-----------------------|---|
| IVR/CC :              | 0 | Online :          | 0 | Performance :         | 0 |
| Release Communication | 2 | Reports :         | 0 | Reports Test :        | 0 |
| Support :             |   | Special Project : | 0 | System Test Support : | 0 |
| Security :            | 0 | Tech Ops :        | 0 | Training :            | 0 |
| Tech Arch :           | 0 |                   |   |                       |   |
| Translation :         | 0 |                   |   |                       |   |



# [CA-226343] DDID 2630: Update IEVS PVS trigger for form CSF 162

|                                   |                         |                                  |                         |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|-------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:                        | <b>Edgars Reinholds</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:                | <b>Jennifer Muna</b>    | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                         | Expedite Changes:                | <b>No</b>               | Estimate:                     | <b>60</b>                  |
| Reporter:                         | <b>Jennifer Muna</b>    | Regulation Reference:            |                         | Created:                      | <b>03/11/2021 04:55 PM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:                 | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Zepeda</b>    | Training Impacted:               | <b>[N/A]</b>            | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:                | <b>Yes</b>              | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee:           |                         | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Carlos Zepeda</b>    | Consortium Review Approval Date: | <b>04/14/2021</b>       |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

The Payment Verification System (PVS) Participant Contact Letter form (CSF 162) is triggered via the IEVS PVS040 interface for all programs when there is discrepancy in income on the interface file with income reported by participant.

#### Request:

1. Update the batch trigger to not generate CSF 162 for CalWORKS, CalFresh or RCA programs.
2. Make the CSF 162 configurable for all 58 counties. Per DDID 2630, counties have submitted their opt-in/opt-out responses to the batch trigger.

#### Recommendation:

1. Update IEVS PVS Reader to not generate CSF 162 for CalWORKS, CalFresh or RCA programs.
2. Create a CSF 162 property for the IEVS PVS Reader to trigger the form generation based on county opt-in/opt-out responses.

### Outreach

#### Description:

#### Migration Impact

#### Description:

Per DDID 2630, specific C-IV counties have opted-in the auto generation for form CSF 162. This update will allow the form generation to be configurable for all 58 counties.

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

Manually generate form in the Template Repository

#### Description:

#### Operational Impact:

**Estimate: 60**

|                                 |   |                    |    |                         |    |
|---------------------------------|---|--------------------|----|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces : | 40 | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0  |
| DBA :                           | 0 | Design :           | 0  | Eligibility :           | 0  |
| Fiscal :                        | 0 | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :           | 0  | Performance :           | 0  |
| Release Communication Support : | 0 | Reports :          | 0  | Reports Test :          | 0  |
| Security :                      | 0 | Special Project :  | 0  | System Test Support :   | 20 |
| Tech Arch :                     | 0 | Tech Ops :         | 0  | Training :              | 0  |
| Translation :                   | 0 |                    |    |                         |    |



# [CA-226923] Update CMIPS Batch Jobs for Migration Counties

|                      |                         |                       |                          |                    |                            |
|----------------------|-------------------------|-----------------------|--------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b> | Assignee:             | <b>Unassigned</b>        | SPG Status:        | <b>No</b>                  |
| Fix Version/s:       | <b>[21.07]</b>          | Designer Contact:     | <b>Sowmya Coppisetty</b> | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:       | <b>21.08.xx</b>         | Expedite Changes:     | <b>No</b>                | Estimate:          | <b>296</b>                 |
| Reporter:            | <b>Amy Gill</b>         | Regulation Reference: |                          | Created:           | <b>03/30/2021 05:17 PM</b> |
| Status:              | <b>Pending Approval</b> | Impact Analysis:      | <b>[N/A]</b>             | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Carlos Zepeda</b>    | Training Impacted:    | <b>[N/A]</b>             | Funding Source:    | <b>LRS M&amp;E</b>         |
| Consortium Contact:  |                         | Migration Impact:     | <b>No</b>                | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>        | Approved by           |                          | Other Agency Cross |                            |
| Committee:           | <b>[Other]</b>          | Committee:            |                          | Reference:         |                            |
| Consortium Review    | <b>Carlos Zepeda</b>    | Consortium Review     | <b>04/23/2021</b>        |                    |                            |
| Approval:            |                         | Approval Date:        |                          |                    |                            |

**Non-Committee Review:** Approved by Carlos Zepada 4/23/2021

**Expedite Approval: Current Design:** During Batch Regression Test, several CMIPS batch jobs were identified as not running for C-IV counties due to missing BPCR/BSCRs or Los Angeles County specific logic that needs to be updated to work for all counties.

**Request:** Update specified CMIPS Batch jobs to run for the appropriate counties.

**Recommendation:** Update the below Case Management, Information and Payrolling System (CMIPS) interface jobs so that county-specific logic only runs for Los Angeles County, and so that the jobs can run for all counties

1. PBXXC408
2. PBXXC409
3. PBXXC411
4. PIXXC601

**Outreach Description:** Batch Property and Scheduling updates in CalSAWS to allow batch jobs to run for specified counties.

**Migration Impact Description:** N/A

**Alternative Procedure Description:** N/A

**Operational Impact:**

|                       |            |                       |     |
|-----------------------|------------|-----------------------|-----|
| <b>Estimate:</b>      | <b>296</b> |                       |     |
| Automated Test :      | 0          | Batch/Interfaces :    | 212 |
| CalHEERS :            | 0          | Batch Operations :    | 0   |
| DBA :                 | 0          | CalHEERS Test :       | 0   |
| Fiscal :              | 0          | Design :              | 0   |
| IVR/CC :              | 0          | Forms Test :          | 0   |
| Release Communication | 0          | Online :              | 0   |
| Support :             | 0          | Reports :             | 0   |
| Security :            | 0          | Special Project :     | 0   |
| Tech Arch :           | 0          | Tech Ops :            | 0   |
| Translation :         | 0          | System Test Support : | 84  |
|                       |            | Training :            | 0   |



# [CA-227257] Update the Non-MAGI Screening and Turning 65 Packets to be available to all counties

|                                   |                              |                                  |                          |                               |                            |
|-----------------------------------|------------------------------|----------------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:                        | <b>Unassigned</b>        | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>               | Designer Contact:                | <b>Rainier Dela Cruz</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.08.XX</b>              | Expedite Changes:                | <b>No</b>                | Estimate:                     | <b>295</b>                 |
| Reporter:                         | <b>Rainier Dela Cruz</b>     | Regulation Reference:            |                          | Created:                      | <b>04/07/2021 02:54 PM</b> |
| Status:                           | <b>Pending Approval</b>      | Impact Analysis:                 | <b>[N/A]</b>             | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Virginia C. Bernal</b>    | Training Impacted:               | <b>[N/A]</b>             | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:                | <b>No</b>                | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>               | Approved by Committee:           |                          | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>Virginia Bernal</b>       | Consortium Review Approval Date: | <b>04/14/2021</b>        |                               |                            |

**Non-Committee Review:** Virginia Bernal - 04/14/2021

**Expedite Approval: Current Design:**

The Non-MAGI Screening and Turning 65 Packets are only available to Los Angeles County in the Template Repository. While the Non-MAGI Screening Packet automated batch process is configured to run for all counties, the Non-MAGI Turning 65 Packet automated batch process is only configured to run for Los Angeles County.

**Request:** The Non-MAGI Screening and Turning 65 Packets need to be available to all counties from Template Repository. The packets also need to be sent through the automated batch process for all counties.

**Recommendation:**

1. Update the Template Repository county visibility for the Non-MAGI Screening Packet to all counties.
2. Update the Template Repository county visibility for the Non-MAGI Turning 65 Packet to all counties.
3. Update the Non-MAGI Turning 65 Packet batch process to run for all counties.  
Note: The automate batch process (PB00R538) that sends out the Non-MAGI Screening Packet runs for all counties.
4. Update the scheduling of Mailing Priority 05 bundling batch jobs for the C-IV Migration Counties to run daily.
5. Create the Mailing Priority 05 bundling batch jobs for the CalWIN Migration Counties.
6. Conduct central print testing with the new print vendor by generating test bundles of the Non-MAGI Screening and Turning 65 Packets.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

The Migration Counties will be inheriting this functionality at migration. The updates is to make sure it works for the Migration Counties.

**Migration Impact**

**Analysis:**

**Alternative**

N/A

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

**295**

|                  |   |                    |   |                         |     |
|------------------|---|--------------------|---|-------------------------|-----|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 0   |
| CalHEERS :       | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 211 |
| DBA :            | 0 | Design :           | 0 | Eligibility :           | 0   |
| Fiscal :         | 0 | Forms Test :       | 0 | Imaging :               | 0   |

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|                       |   |                   |   |                       |    |
|-----------------------|---|-------------------|---|-----------------------|----|
| IVR/CC :              | 0 | Online :          | 0 | Performance :         | 0  |
| Release Communication | 0 | Reports :         | 0 | Reports Test :        | 0  |
| Support :             |   |                   |   |                       |    |
| Security :            | 0 | Special Project : | 0 | System Test Support : | 84 |
| Tech Arch :           | 0 | Tech Ops :        | 0 | Training :            | 0  |
| Translation :         | 0 |                   |   |                       |    |



# [CA-227265] Update CCSAS interface logic of sending/receiving CPS case number

|                      |                          |                       |                          |                    |                            |
|----------------------|--------------------------|-----------------------|--------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b>  | Assignee:             | <b>Edgars Reinholds</b>  | SPG Status:        | <b>No</b>                  |
| Fix Version/s:       | <b>[21.07]</b>           | Designer Contact:     | <b>Sowmya Coppisetty</b> | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:       |                          | Expedite Changes:     | <b>Start Build</b>       | Estimate:          | <b>278</b>                 |
| Reporter:            | <b>Sowmya Coppisetty</b> | Regulation Reference: |                          | Created:           | <b>04/07/2021 03:55 PM</b> |
| Status:              | <b>In Development</b>    | Impact Analysis:      | <b>[N/A]</b>             | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Frederick Gains</b>   | Training Impacted:    | <b>[N/A]</b>             | Funding Source:    | <b>LRS M&amp;E</b>         |
| Consortium Contact:  |                          | Migration Impact:     | <b>No</b>                | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>         | Approved by           |                          | Other Agency Cross |                            |
| Committee:           | <b>[Other]</b>           | Committee:            |                          | Reference:         |                            |
| Consortium Review    | <b>F. Gains</b>          | Consortium Review     | <b>04/27/2021</b>        |                    |                            |
| Approval:            |                          | Approval Date:        |                          |                    |                            |

**Non-Committee Review:** Approved by Frederick Gains 4/20/2021

**Expedite Approval:** Approved by Karen J. Rapponotti on 04/28/2021

**Current Design:** In CalSAWS, when a CCSAS transaction is triggered for a child who is on a Foster Care (FC) or Kin-GAP (KG) program and the same child has a companion case with a Child Protective Services (CPS) program, then the case number of the CPS program is sent in the CASE\_NUMBER data element in the CCSAS outbound file. And, if a case number received in the CCSAS Inbound file is a CPS case number, then the inbound job will try to get the companion case number of the FC or KG program for downstream processing. The interface processing logic of sending or receiving the CPS case number in the CCSAS Outbound and Inbound jobs should be applicable to Los Angeles County only.

**Request:** Update the interface processing logic of sending or receiving the CPS case number in the CCSAS outbound and inbound jobs to be applicable to Los Angeles County only.

**Recommendation:** Update the following CCSAS Outbound and Inbound batch jobs:  
 1. CCSAS Outbound Writer Job (POXXF1601): Update the interface processing logic of sending the CPS case number in the CCSAS Outbound File when the person is on a FC or KG program and has a companion case with a CPS program to be applicable to Los Angeles County only.  
 2. CCSAS Inbound Reader Job (PIXXF1601): Update the interface processing logic in the CCSAS inbound file to be applicable to Los Angeles County only, where if the case number in the transaction received in the inbound file is a CPS case number then the CCSAS inbound reader job tries to get the companion FC or KG case number for downstream processing.

**Outreach**

**Description:** No impact to the C-IV counties as the changes with this SCR only impact L.A. County specific functionality

**Migration Impact Description:**

**Migration Impact Analysis:** N/A

**Alternative Procedure Description:**

**Operational Impact Estimate:** 278

|                                 |   |                    |     |                         |   |
|---------------------------------|---|--------------------|-----|-------------------------|---|
| Automated Test :                | 0 | Batch/Interfaces : | 278 | Batch Operations :      | 0 |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0 | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0 | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0 | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0 | Reports :          | 0   | Reports Test :          | 0 |



# [CA-227343] Update Long Term Sanction Logic for C-IV Converted Data

|                      |                                 |                       |                        |                    |                            |
|----------------------|---------------------------------|-----------------------|------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Eligibility</b>              | Assignee:             | <b>Nicholas Trusso</b> | SPG Status:        | <b>Approved</b>            |
| Fix Version/s:       | <b>[21.07]</b>                  | Designer Contact:     | <b>Thomas Lazio</b>    | Change Type (SCR): | <b>Enhancement</b>         |
| Minor Version:       |                                 | Expedite Changes:     | <b>Start Build</b>     | Estimate:          | <b>187</b>                 |
| Reporter:            | <b>Ritu Chinya</b>              | Regulation Reference: |                        | Created:           | <b>04/09/2021 11:11 AM</b> |
| Status:              | <b>Approved</b>                 | Impact Analysis:      | <b>[N/A]</b>           | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Binh Tran</b>                | Training Impacted:    | <b>[N/A]</b>           | Funding Source:    | <b>LRS M&amp;E</b>         |
| Consortium Contact:  |                                 | Migration Impact:     | <b>No</b>              | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Migration</b>                | Approved by           |                        | Other Agency Cross |                            |
| Committee:           | <b>[CalWORKs/<br/>CalFresh]</b> | Committee:            |                        | Reference:         |                            |
| Consortium Review    |                                 | Consortium Review     |                        |                    |                            |
| Approval:            |                                 | Approval Date:        |                        |                    |                            |

**Non-Committee Review:** Binh Tran on 04/22/2021

**Expedite Approval:** Approved - Karen Rapponotti 04/23/21

**Current Design:** CalSAWS EDBC rules use data from a table (PGM\_PERS\_SANCTN) that does not exist in C-IV to apply long term sanction (LTS) aid codes for CW individuals that are determined to be long term sanctioned.

**Request:** A new EDBC rule based on the C-IV LTS logic will be added to properly determine LTS aid codes 3F and K1 for C-IV converted cases that do not yet have EDBC sanction data history in CalSAWS. This will allow the C-IV converted cases to build up data history that can later be used by the existing CalSAWS LTS aid code determination rules.

**Recommendation:** Add EDBC rule based on C-IV LTS logic to allow the CalSAWS EDBC to properly determine LTS aid codes 3F and K1 for C-IV converted cases that do not yet have EDBC sanction data history in CalSAWS.

**Outreach Description:**

**Migration Impact Description:** The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact Analysis:**

**Alternative Procedure Description:** Override EDBC

**Operational Impact:**

**Estimate:** **187**

|                       |   |                    |   |                         |    |
|-----------------------|---|--------------------|---|-------------------------|----|
| Automated Test :      | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 0  |
| CalHEERS :            | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 0  |
| DBA :                 | 0 | Design :           | 0 | Eligibility :           | 89 |
| Fiscal :              | 0 | Forms Test :       | 0 | Imaging :               | 0  |
| IVR/CC :              | 0 | Online :           | 0 | Performance :           | 0  |
| Release Communication | 0 | Reports :          | 0 | Reports Test :          | 0  |
| Support :             |   | Special Project :  | 0 | System Test Support :   | 83 |
| Security :            | 0 | Tech Ops :         | 0 | Training :              | 0  |
| Tech Arch :           | 0 |                    |   |                         |    |
| Translation :         | 0 |                    |   |                         |    |



# [CA-213759] Update Child Support Interface to send correct Begin Date

|                                   |                             |                                  |                            |                               |                            |
|-----------------------------------|-----------------------------|----------------------------------|----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b>     | Assignee:                        | <b>Unassigned</b>          | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.11]</b>              | Designer Contact:                | <b>Sowmya Coppisetty</b>   | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                             | Expedite Changes:                | <b>No</b>                  | Estimate:                     | <b>363</b>                 |
| Reporter:                         | <b>Frederick Gains</b>      | Regulation Reference:            |                            | Created:                      | <b>02/20/2020 03:05 PM</b> |
| Status:                           | <b>Pending Approval</b>     | Impact Analysis:                 | <b>[Batch Performance]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Frederick Gains</b>      | Training Impacted:               |                            | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Production</b>           | Migration Impact:                | <b>No</b>                  | Funding Source ID:            |                            |
| Committee:                        | <b>[CalWORKs/ CalFresh]</b> | Approved by Committee:           | <b>04/22/2021</b>          | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                             | Consortium Review Approval Date: |                            |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, when the eligibility status of the Absent Parent, Custodial Parent, Dependent Person (the child), and Other Persons associated to the Child Support Referral is updated, the Beginning Date of Aid data element in the outbound file is populated with the aid code begin date (i.e., first date being active without a break in aid) associated to the program.

#### Request:

Update the CCSAS Outbound interface to set the Beginning Date of Aid data element appropriately when there is a change in the eligibility status.

#### Recommendation:

Update the CCSAS Outbound interface logic of populating the Beginning Date of Aid when there is a change in the eligibility status with the effective date of when the person's status/role has changed.

### Outreach

#### Description:

#### Migration Impact

No Impact as this SCR will be implemented in CalSAWS post migration 21.11 release .

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate: **363**

|                                 |   |                    |     |                         |     |
|---------------------------------|---|--------------------|-----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces : | 259 | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0   | Client Correspondence : | 0   |
| DBA :                           | 0 | Design :           | 0   | Eligibility :           | 0   |
| Fiscal :                        | 0 | Forms Test :       | 0   | Imaging :               | 0   |
| IVR/CC :                        | 0 | Online :           | 0   | Performance :           | 0   |
| Release Communication Support : | 0 | Reports :          | 0   | Reports Test :          | 0   |
| Security :                      | 0 | Special Project :  | 0   | System Test Support :   | 104 |
| Tech Arch :                     | 0 | Tech Ops :         | 0   | Training :              | 0   |
| Translation :                   | 0 |                    |     |                         |     |

End SCRs



# [CA-214740] DDID 2297 FDS: API - Case API

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Manikandan Rajamani</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>            | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.05.x1</b>         | Expedite Changes:      | <b>No</b>                   | Estimate:                     | <b>536</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     | <b>[N/A]</b>                | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      |                             | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

There is no Application Programming Interface (API) available to external partners which allows access to read case data from the CalSAWS system.

#### Request:

Create a service that will allow the 58 Counties to search for cases by case number, EBT card/account number, individual demographic information, or participant phone number.

#### Recommendation:

Create a new endpoint that will retrieve case information. Please see detailed design for more information.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate: **536**

|                                 |     |                    |     |                         |   |
|---------------------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test :                | 116 | Batch/Interfaces : | 388 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32  | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0   |                    |     |                         |   |

### Content Revision

Pending CCB

#### Status-1:

#### Content Revision

#### Description-1:

1. Recommendation Change:  
Before:  
Section 2.1.4 included a worker object in the response.

After:  
Section 2.1.4 removed worker object from response.

---

See technical spec for additional updates.

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

 **[CA-214745] DDID 2342 FDS: API - Appointment API**

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Manikandan Rajamani</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>            | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.03.x5</b>         | Expedite Changes:      | <b>No</b>                   | Estimate:                     | <b>536</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>System Test</b>      | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     | <b>[N/A]</b>                | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      | <b>No</b>                   | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

**Non-Committee**

**Review:**  
**Expedite Approval:**  
**Current Design:** This is a new API made available to expose the customer appointment data from the CalSAWS system.  
**Request:** Create a service that can retrieve, update, and create appointments.  
**Recommendation:** Create a new endpoint to retrieve, update and create appointments. Add filter criteria based on scheduled appointments by EBT card number, case number, Document ID, person information and appointment type, worker number date, and status to limit the results returned. See attached design and technical design for more details

**Outreach**

**Description:**  
**Migration Impact Description:** The functional APIs have no migration impact.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A - CalSAWS DD&I

**Operational Impact:**  
**Estimate:** **536**

|                                 |     |                    |     |                         |   |
|---------------------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test :                | 116 | Batch/Interfaces : | 388 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32  | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0   |                    |     |                         |   |

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** Request is to move it to RWR. Approved by Laura Chavez <ChavezL@CalSAWS.org>

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:** 1. Recommendation Change:  
Before:

After:

Updated field names to be camel case.

Updated field names to remove references to 'code' in the names

Updated /appointments/appointment from put to post

Added additional error messages and headers

Added assumptions.

Refer to the appointments.html document for updated technical specifications and data element definitions.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-214748] DDID 2345 FDS: API - Documents API

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Manikandan Rajamani</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>            | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.05.x1</b>         | Expedite Changes:      | <b>No</b>                   | Estimate:                     | <b>211</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     |                             | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      |                             | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

There is no Application Programming Interface (API) available to external partners which allows access to read case data from the CalSAWS system.

#### Request:

Create a service that will allow the 58 Counties to search for documents by barcode or case number and allows to update documents to be received

#### Recommendation:

Create a new endpoint that will retrieve and update document information. Please see detailed design for additional details.

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**211**

|                                 |    |                    |     |                         |   |
|---------------------------------|----|--------------------|-----|-------------------------|---|
| Automated Test :                | 41 | Batch/Interfaces : | 138 | Batch Operations :      | 0 |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0  | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0  | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0  | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0  | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0  | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32 | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0  |                    |     |                         |   |

### Content Revision

#### Status-1:

Pending CCB

#### Content Revision

#### Description-1:

1. Recommendation Change:  
Before:

After:

Added header details

refer to the documents.html document for updated technical specifications and data element definitions.



# [CA-214753] DDID 2350 FDS: API - Program API

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Manikandan Rajamani</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>            | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.05.x1</b>         | Expedite Changes:      | <b>No</b>                   | Estimate:                     | <b>536</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     |                             | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      |                             | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** There is no Application Programming Interface (API) available to external partners which allows access to read Program data in CalSAWS.

**Request:** Create a service that can retrieve program information for a given case ID or persons SSN or CIN.

**Recommendation:** Create a new endpoint to retrieve program information. Please see detailed design for more information.

### Outreach

**Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A - CalSAWS DD&I

**Operational Impact:**  
**Estimate:** **536**

|                                 |     |                    |     |                         |   |
|---------------------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test :                | 116 | Batch/Interfaces : | 388 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32  | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0   |                    |     |                         |   |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:**  
 1. Recommendation Change:  
 Before:  
 Section 2.1.3 Did not have view date as an input field  
 After:  
 Section 2.1.3 added view date as an input field  
 Updated technical spec with additional changes.



# [CA-214755] DDID 2352 FDS: API - Task API

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Manikandan Rajamani</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[RWR]</b>            | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.03.x5</b>         | Expedite Changes:      | <b>Start Build</b>          | Estimate:                     | <b>536</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>System Test</b>      | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     | <b>[N/A]</b>                | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      |                             | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

### Non-Committee

**Review:**

**Expedite Approval:** Approved by JoAnne to Start Build on 12/07/2020

**Current Design:** There is no Application Programming Interface (API) available to external partners which allows access to modify and read Task data in CalSAWS.

**Request:** Create an API endpoint that can retrieve, update, and create Tasks in CalSAWS.

**Recommendation:** Create a new API endpoint allowing the following operations:  
 Retrieve Task and Task Type information that meet specified criteria  
 Update Task  
 Create Task

### Outreach

#### Description:

#### Migration Impact

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

N/A - CalSAWS DD&I

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 536**

|                                 |     |                    |     |                         |   |
|---------------------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test :                | 116 | Batch/Interfaces : | 388 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32  | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0   |                    |     |                         |   |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: Before:

After:  
Updated filters and responses

Renamed all fields to be camelCase.  
Added section for headers.  
Refer to the tasks.html document for updated technical specifications and data element definitions.

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-200366] Migration SCR for CCR

- Resolved: 11/28/2020 10:58 AM

|                                   |                                  |                        |                               |                               |                            |
|-----------------------------------|----------------------------------|------------------------|-------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Eligibility</b>               | Assignee:              | <b>Nicholas Trusso</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.01]</b>                   | Designer Contact:      | <b>Paul Galloway</b>          | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                                  | Expedite Changes:      | <b>Start Build</b>            | Estimate:                     | <b>3031</b>                |
| Reporter:                         | <b>Girish Chakkingal</b>         | Regulation Reference:  |                               | Created:                      | <b>01/25/2018 02:18 PM</b> |
| Status:                           | <b>In Production</b>             | Impact Analysis:       | <b>[Security]</b>             | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Ignacio Lazaro</b>            | Training Impacted:     | <b>[Job Aid, Online Help]</b> | Funding Source:               | <b>Premise</b>             |
| Project Phase (SCR):              | <b>Migration</b>                 | Migration Impact:      | <b>Yes</b>                    | Funding Source ID:            | <b>CCR</b>                 |
| Committee:                        | <b>[Foster Care/Kin GAP/AAP]</b> | Approved by Committee: | <b>2020-10-09 00:00:00.0</b>  | Other Agency Cross Reference: |                            |

## Non-Committee

### Review:

**Expedite Approval:** Karen J. Rapponotti 09/28/2020

### Current Design:

- > C-IV made CCR updates to the Foster Care Facility Ratios pages that were not implemented in LRS.
- > C-IV tracks multiple types of State Program numbers for FC resources. LRS only tracks one.
- > C-IV added a resource type 'Foster Family Agency' (FFA) for CCR which is not in LRS/CalSAWS.
- > C-IV allows workers to enter FC and Kin-GAP rates with Begin Dates and End Dates up to one month in the future. In LRS/CalSAWS those dates can only be after the current system date for AAP.
- > C-IV allows Standard, Non Standard, and Dual Agency rates for 'Out of State Basic' placements. LRS/CalSAWS only allows Non Standard rates for that placement type.
- > C-IV added validations that prevent EDBC from running on FC programs where a Placement Authority is Non-Related Legal Guardianship and certain rates exist. LRS determines NRLG placements differently and did not implement these validations.
- > C-IV's LOC reason NOA fragments generate under different Action Types and conditions than their corresponding fragments in LRS/CalSAWS. LRS/CalSAWS does not have a fragment for 'Failure to Complete Redetermination' for Foster Care.
- > CIV-12488 updated FC EDBC in C-IV to pay Special Care Increments (SCI's) for eligible Foster Family Agency (FFA) placements.

### Request:

Designs were not made jointly between C-IV and LRS/CalSAWS at the time, and there are differences in how CCR was implemented that need to be addressed prior to migration of C-IV into LRS/CalSAWS.

### Recommendation:

(See attached design document for complete design details)

- > Modify the Foster Care Facility Ratio Detail pages in LRS/CalSAWS to accept CCR ratio types and other features.
- > Remove existing Foster Care Ratio Detail data in LRS that was loaded into LRS at conversion and is now outdated.
- > Move the State Program Number field from the Foster Care License Detail page to the Resource Detail page, track ISFC and non-ISFC types, and requires a State Program Number for certain placement types.
- > Remove Existing State Program Number data in LRS that was loaded into LRS at conversion and is now outdated.
- > Update the DCFS FC Inbound Reader Interface for the new State Program Number data structure, and populate 0000.00.00 for any placement type where a State Program Number is required.
- > Add a soft validation for FC EDBC when an ISFC rate is selected and the State Program Number does not indicate that it should be paid ISFC rates (unless the State Program Number is 0000.00.00).
- > Add 'Foster Family Agency' placement type to the Foster Care Resource Detail page. Update Child Placement Detail and Rate Detail pages and EDBC for the new placement type.
- > Update Foster Care and Kin-GAP Rate Detail pages to allow workers to save rates with Begin Dates and End Dates up to one month in the future.
- > Add 'Standard State Rate' and 'Dual Agency' types to the 'Type' dropdown on the FC Rate Detail for 'Out of State Basic' placements.
- > Add soft validations to the Run EDBC page to alert workers when a Placement Authority is Non-Related Legal Guardianship and a Probate Court or Juvenile court order has a rate level that should not be associated with that type of placement.

- > Update Fiscal batch and Interface jobs to read the State Program Number from the new fields.
- > Update the generation conditions for CCR-related NOAs.
- > Update verbiage for the Supplemental Care Increment Change NOA.
- > Update FC EDBC to include FFA placements as a placement type that can be paid SCI's, effective 3/1/2018.
- > Regression test SCI NOA fragments for the newly added FFA placement type.

(See attached design document for complete design details)

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Closes a design difference. C-IV feedback has been addressed and the design has been approved through the FC Committee. The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

All claiming reports to be generated outside of system if these changes not implemented.

**Description:**

**Operational Impact:**

**Estimate:**

**3031**

|                                 |     |                    |     |                         |     |
|---------------------------------|-----|--------------------|-----|-------------------------|-----|
| Automated Test :                | 216 | Batch/Interfaces : | 91  | Batch Operations :      | 0   |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 360 |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 310 |
| Fiscal :                        | 298 | Forms Test :       | 0   | Imaging :               | 0   |
| IVR/CC :                        | 0   | Online :           | 707 | Performance :           | 0   |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0   |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 774 |
| Tech Arch :                     | 0   | Tech Ops :         | 0   | Training :              | 0   |
| Translation :                   | 0   |                    |     |                         |     |

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

Current Design (add one additional item):

- > CIV-12488 updated FC EDBC in C-IV to pay Special Care Increments (SCI's) for eligible Foster Family Agency (FFA) placements.

Recommendation (add two additional items):

- > Update FC EDBC to include FFA placements as a placement type that can be paid SCI's, effective 3/1/2018.
- > Regression test SCI NOA fragments for the newly added FFA placement type.

(See details in updated Design Document attached for Content Revision 1.)

-----  
 Before:  
 Client Correspondence ETC 3: 0

---  
 After:  
 Client Correspondence ETC 3: 43

-----  
 Before:  
 Eligibility ETC 1: 40

---  
 After:  
 Eligibility ETC 1: 85

-----  
 Before:  
 System Test Support ETC 1: 718

---  
 After:  
 System Test Support ETC 1: 764

-----  
Before:  
Unallocated Hours: 260

---  
After:  
Unallocated Hours: 275  
-----

**Content Revision  
Status-2:**

Accepted

**Content Revision  
Description-2:**

Removing 'Standard State Rate' from the Type field dropdown for 'Foster Family Agency' placement type on Foster Care Rate Detail page. See updates in sections 2.7.1, 2.7.3, 2.9.1, and 2.25.2 of attached design document for Content Revision 2.

-----  
Before:  
System Test Support ETC 1: 764

---  
After:  
System Test Support ETC 1: 774  
-----

**Content Revision  
Status-3:**

Accepted

**Content Revision  
Description-3:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: N/A
4. Funding Source Change:  
Before: LRS M&E  
After: Premise

**Content Revision  
Status-4:**

Pending CCB

**Content Revision  
Description-4:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: N/A
4. Funding Source Change:  
Before: Premise  
After: LRS M&E



## [CA-213719] ACL 19-76: Batch EDBC Run to Apply 2021 Earned Income Disregard and Reevaluate IRT Tier 2

|                                   |                             |                        |                              |                               |                            |
|-----------------------------------|-----------------------------|------------------------|------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Eligibility</b>          | Assignee:              | <b>Praveen Badabhagni</b>    | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.03]</b>              | Designer Contact:      | <b>Thomas Lazio</b>          | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:                    | <b>21.05.08</b>             | Expedite Changes:      | <b>Production Deployment</b> | Estimate:                     | <b>430</b>                 |
| Reporter:                         | <b>Jason M. Francis</b>     | Regulation Reference:  | <b>ACL 19-76</b>             | Created:                      | <b>02/19/2020 04:08 PM</b> |
| Status:                           | <b>System Test</b>          | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>Yes</b>                 |
| Policy/Design Consortium Contact: | <b>Binh Tran</b>            | Training Impacted:     |                              | Funding Source:               | <b>Premise</b>             |
| Project Phase (SCR):              | <b>Production</b>           | Migration Impact:      | <b>No</b>                    | Funding Source ID:            | <b>EID</b>                 |
| Committee:                        | <b>[CalWORKs/ CalFresh]</b> | Approved by Committee: |                              | Other Agency Cross Reference: | <b>CIV-106463</b>          |

### Non-Committee

#### Review:

**Expedite Approval:** Approved by Karen Rapponotti on 3/22/2021

#### Current Design:

SCR CA-212912 updated the CalWORKs Earned Income Disregard to \$550 (per ACL 19-76) and also updated the Tier 2 IRT based on the Assistance Unit Size rather than the Family Unit Size (per CRPC 2225).

#### Request:

CalWORKs benefits must be updated based on the new Earned Income Disregard. A SAR 2 with an updated Income Reporting Threshold must be generated and sent.

#### Recommendation:

1. Run batch EDBC for the benefit month of 06/2021 for all open programs (except Medi-Cal) on cases with an active or ineligible CalWORKs or RCA program in targeted program mode (including CF and SNB on targeted cases) that meet either of the following conditions:

- a) Has an active person who is not an 'FRI' or 'FSO' that has income effective for 06/2021.
- b) Has an active 'FRI' or 'FSO' member in the program for the benefit month of 06/2021.
- c) Exclude the following programs:

- i) The benefit month is past the latest RE due date for the program.
- ii) The program has a SAR7 Due Month of 05/2021 and the report status is Sent, Received, or Incomplete
- iii) An EDBC has already been processed for the 06/2021 benefit month since the implementation of SCR CA-212912 / CIV-106461.

d) Run EDBC for the population in 1a) and not in 1b) with Run Reason 'CW EID Update' (CT744-XX) and Sub Type code 'CW EID Update' (CT942-XX). Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: CW EID Update

Note: New CTCR will be needed for adding Run Reason 'CW EID Update' (CT744-XX) and Sub Type code 'CW EID Update' (CT942-XX).

e) Run EDBC for the population in 1b) with Run Reason 'CW IRT Update' (CT744-IR) and Sub Type code 'CW IRT Update' (CT942-C4). Batch EDBC will insert the following Journal entry:

Short Description: Batch EDBC ran for <month, year>

Long Description: Batch EDBC Ran for <Effective Month>. Batch EDBC processed for the <Program Name> program for following reasons: CW IRT Update

2) Run the DCR to update the SAR 2 Effective month as high dated EDBC month i.e. June 2021 (in SYS\_TRANSACT table) to populate the latest IRT limit on SAR 2 form for the cases run through this batch run.

3) Generate the following lists from the batch EDBC process. Each of the lists will include the Standard List Columns:

- Case Name
- Case Number
- County

Unit  
 Unit Name  
 Office Name  
 Worker ID

a) List of cases discontinued by the batch EDBC process. The case listing will be named "List of Cases Discontinued by Batch EDBC Process".

Note: Include additional columns to indicate program type and program closure reason

b) List of cases where the batch EDBC process closed a person. The case listing will be named "List of Cases Where Batch EDBC Process Closed a Person".

Note: Include additional columns to indicate program type

c) List of cases where the CW EDBC resulted in a benefit reduction. The case listing will be named "List of CW Cases that Resulted in Benefit Reduction".

Note: Include additional columns to indicate each of the benefit reduction type reasons in separate columns (Household/AU Size Change, Income Change, Proration Change, Over Payment Adjustment Change, Benefit Month)

d) List of cases which resulted in a read-only EDBC. The case listing will be named "List of Cases That Resulted in Read-Only EDBC".

Note: Include additional columns to indicate program type and read-only reason

e) List of cases skipped in the batch run. The case listing will be named "List of Cases Skipped in Batch Run".

Note: Include additional columns to indicate the skip reason and program type.

4) Batch Operations:

a. Run the DCR for recommendation 1a to insert records into SYS\_TRANSACT for targeted programs on the case for the month of 06/2021.

b. Run the DCR for recommendation 1b to insert records into SYS\_TRANSACT for targeted programs on the case for the month of 06/2021.

c. Run batch EDBC.

d. Run the DCR for recommendation 2.

**Outreach**

**Description:**

Lists of affected cases will be posted to the CalSAWS Web Portal in the following location: CalSAWS Web Portal>System Changes> SCR and SIR Lists > 2021 > SCR CA-213719

**Migration Impact**

**Description:**

This SCR will operationally run EDBC. There are no system modifications.

**Migration Impact**

**Analysis:**

**Alternative**

Run EDBC

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:**

430

|                                 |   |                    |   |                         |     |
|---------------------------------|---|--------------------|---|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 40  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 40  |
| DBA :                           | 0 | Design :           | 0 | Eligibility :           | 230 |
| Fiscal :                        | 0 | Forms Test :       | 0 | Imaging :               | 0   |
| IVR/CC :                        | 0 | Online :           | 0 | Performance :           | 0   |
| Release Communication Support : | 0 | Reports :          | 0 | Reports Test :          | 0   |
| Security :                      | 0 | Special Project :  | 0 | System Test Support :   | 80  |
| Tech Arch :                     | 0 | Tech Ops :         | 0 | Training :              | 0   |
| Translation :                   | 0 |                    |   |                         |     |

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

1. Recommendation Change:

**Description-1:**

Before:

Recommendation 2 in JIRA: Run the DCR to update the SAR 2 Effective month as high dated EDBC month i.e. June 2021 (in SYS\_TRANSACT table) to populate the latest IRT limit on SAR 2 form for the cases run through this batch run.

After:

Recommendation 2 in JIRA: Run the DCR to trigger the SAR 2 for CW cases and to update the SAR 2 Effective month as high dated EDBC month i.e. June 2021 (in SYS\_TRANSACT table) to populate the latest IRT limit on SAR 2 form for the cases run through this batch run.

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-214751] DDID 2348 FDS: API - Journal API

- Resolved: 03/29/2021 02:00 PM

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Manikandan Rajamani</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.03]</b>          | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.19</b>         | Expedite Changes:      | <b>No</b>                   | Estimate:                     | <b>211</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>In Production</b>    | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     | <b>[N/A]</b>                | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      | <b>No</b>                   | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

This is a new API made available to expose the Journal\_Entry data object from the CalSAWS system.

### Request:

Create a service that returns all journal entries for a specific case.

### Recommendation:

Create a new endpoint to retrieve journal details.  
Add filter criteria based on caseld, date, journal category and journal type to limit the results returned.  
See attached design and technical design for more details

## Outreach

### Description:

### Migration Impact

The functional APIs have no migration impact.

### Description:

### Migration Impact

### Analysis:

### Alternative

N/A - CalSAWS DD&I

### Procedure

### Description:

### Operational Impact:

### Estimate:

**211**

|                                 |    |                    |     |                         |   |
|---------------------------------|----|--------------------|-----|-------------------------|---|
| Automated Test :                | 41 | Batch/Interfaces : | 138 | Batch Operations :      | 0 |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0  | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0  | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0  | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0  | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0  | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32 | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0  |                    |     |                         |   |

### Content Revision

Accepted

### Status-1:

### Content Revision

Request is to move it to RWR. Approved by Laura Chavez <ChavezL@CalSAWS.org>

### Description-1:

### Content Revision

Pending CCB

### Status-2:

### Content Revision

1. Recommendation Change:

### Description-2:

Before:

After:

Updated return object to include journal entry append.

Added additional CT values.

Added header details.

Refer to the journals.html document for updated technical specifications and data element definitions.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

# [CA-214760] DDID 2357 FDS: API - Worker Schedule API

- Resolved: 04/19/2021 08:56 AM

|                                   |                         |                        |                             |                               |                            |
|-----------------------------------|-------------------------|------------------------|-----------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Batch/Interfaces</b> | Assignee:              | <b>Yuga Teja</b>            | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.03]</b>          | Designer Contact:      | <b>Avinda Bandaranayake</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.19</b>         | Expedite Changes:      | <b>Start Build</b>          | Estimate:                     | <b>536</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>     | Regulation Reference:  |                             | Created:                      | <b>03/30/2020 08:41 AM</b> |
| Status:                           | <b>In Production</b>    | Impact Analysis:       | <b>[N/A]</b>                | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Logan Pratt</b>      | Training Impacted:     |                             | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>        | Migration Impact:      | <b>No</b>                   | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                             | Other Agency Cross Reference: |                            |

**Non-Committee**

**Review:**

**Expedite Approval:** Approved by JoAnne to Start Build on 12/07/2020

**Current Design:** This is a new API made available to provide the worker schedule data from the CalSAWS system.

**Request:** Create a service that can retrieve, update, and create worker schedule.

**Recommendation:** Create a new endpoint to retrieve, update, and create worker schedule.

**Outreach**

**Description:**

**Migration Impact Description:** There is no migration impact for API functionalities.

**Migration Impact**

**Description:**

**Analysis:**

**Alternative Procedure Description:** N/A - CalSAWS DD&I

**Operational Impact:**

**Estimate:**

**536**

|                                 |     |                    |     |                         |   |
|---------------------------------|-----|--------------------|-----|-------------------------|---|
| Automated Test :                | 116 | Batch/Interfaces : | 388 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0   | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0   | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0   | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0   | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0   | Reports Test :          | 0 |
| Security :                      | 0   | Special Project :  | 0   | System Test Support :   | 0 |
| Tech Arch :                     | 32  | Tech Ops :         | 0   | Training :              | 0 |
| Translation :                   | 0   |                    |     |                         |   |

**Content Revision**

**Status-1:** Accepted

**Content Revision Description-1:** Request is to move it to RWR. Approved by Laura Chavez <ChavezL@CalSAWS.org>

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:** 1. Recommendation Change:

Before:

After:  
Updated field names to be camel case.  
Added header details

refer to the workerschedule.html document for updated technical specifications and data element definitions.

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-219543] Test Effort for the CalFresh SSA COLA (Deferred to 03/2022)

- Resolved: 12/30/2020 08:52 AM

|                      |                                |                       |                         |                    |                            |
|----------------------|--------------------------------|-----------------------|-------------------------|--------------------|----------------------------|
| Team Responsible:    | <b>Batch/Interfaces</b>        | Assignee:             | <b>Michael Barillas</b> | SPG Status:        | <b>Pending</b>             |
| Fix Version/s:       | <b>[21.03]</b>                 | Designer Contact:     | <b>Michael Barillas</b> | Change Type (SCR): | <b>New Policy</b>          |
| Minor Version:       | <b>21.05.xx</b>                | Expedite Changes:     | <b>Start Build</b>      | Estimate:          | <b>451</b>                 |
| Reporter:            | <b>Ritu Chinya</b>             | Regulation Reference: | <b>TBD</b>              | Created:           | <b>09/08/2020 03:41 PM</b> |
| Status:              | <b>System Test</b>             | Impact Analysis:      | <b>[N/A]</b>            | Outreach Required: | <b>No</b>                  |
| Policy/Design        | <b>Caroline Bui</b>            | Training Impacted:    |                         | Funding Source:    | <b>LRS M&amp;E</b>         |
| Consortium Contact:  |                                | Migration Impact:     | <b>No</b>               | Funding Source ID: |                            |
| Project Phase (SCR): | <b>Production</b>              | Approved by           |                         | Other Agency Cross | <b>CIV-108152</b>          |
| Committee:           | <b>[CaWORKs/<br/>CalFresh]</b> | Committee:            |                         | Reference:         |                            |

## Non-Committee

### Review:

**Expedite Approval:** Approved by Michele Peterson on 12/3/2020.

**Current Design:** SSI/SSP assistance is not automatically updated when the Social Security Administration (SSA) Cost of Living Adjustments (COLA) changes are applied to the Systems.

**Request:** This SCR is to test a proof of concept with MEDS to prepare for the CalFresh SSA COLA which has been deferred to March 2022.

The Systems will generate and send a file to MEDS containing CalFresh persons receiving SSI or SSI/SSP Income. After sending the file, MEDS will provide a one-time response file that includes elements in the initial outbound file, as well as additional SSI and/or SSP payment amounts. CalSAWS will process the inbound file and update OPA records with the new SSI or SSI/SSP amounts. CalSAWS will generate an exceptions list containing records that could not be processed.

### Recommendation:

For testing purposes only:

1. Create a one-time outbound file for CalFresh persons receiving SSI or SSI/SSP Income and send to MEDS.
2. Process a one-time Inbound MEDS SSI/SSP COLA Response File containing the data in the CalSAWS outbound file as well as additional SSI and/or SSP Payment Amounts.
3. Create an exceptions list for all unprocessed records in the Inbound MEDS SSI/SSP COLA Response File.

Note: The file will not be implemented in Production at this time. This effort is only to test the proof of concept and validate the data exchanged with MEDS. Production effort is deferred until March 2022.

## Outreach

### Description:

**Migration Impact Description:** This SCR will generate a one-time outbound file.

### Migration Impact

### Description:

### Analysis:

### Alternative

N/A - Test only

### Procedure

### Description:

### Operational Impact:

**Estimate:** 451

|                       |   |                    |     |                         |    |
|-----------------------|---|--------------------|-----|-------------------------|----|
| Automated Test :      | 0 | Batch/Interfaces : | 316 | Batch Operations :      | 40 |
| CalHEERS :            | 0 | CalHEERS Test :    | 0   | Client Correspondence : | 0  |
| DBA :                 | 0 | Design :           | 0   | Eligibility :           | 0  |
| Fiscal :              | 0 | Forms Test :       | 0   | Imaging :               | 0  |
| IVR/CC :              | 0 | Online :           | 0   | Performance :           | 0  |
| Release Communication | 0 | Reports :          | 0   | Reports Test :          | 0  |
| Support :             |   | Special Project :  | 0   | System Test Support :   | 60 |
| Security :            | 0 | Tech Ops :         | 0   | Training :              | 0  |
| Tech Arch :           | 0 |                    |     |                         |    |

Translation :

0

**Content Revision**

Pending CCB

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
Before: No recommendation #2.b.5 in Section 2.2.2  
After: Added recommendation #2.b.5 in Section 2.2.2

2. Estimate Change:  
Before:  
Batch/Interface ETC 1: 316  
After:  
Batch/Interface ETC 1: 331

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision**  
**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision**  
**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:



# [CA-220787] Update Eligibility Supervisor WBTs for 20.11 and 21.01 App Dev Changes

- Resolved: 04/01/2021 09:49 AM

|                                   |                      |                        |                       |                               |                            |
|-----------------------------------|----------------------|------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Training</b>      | Assignee:              | <b>Virgil Neyroud</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.03]</b>       | Designer Contact:      | <b>Luis Alvarado</b>  | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.05.21</b>      | Expedite Changes:      | <b>No</b>             | Estimate:                     | <b>44</b>                  |
| Reporter:                         | <b>Luis Alvarado</b> | Regulation Reference:  |                       | Created:                      | <b>10/13/2020 11:15 AM</b> |
| Status:                           | <b>In Production</b> | Impact Analysis:       | <b>[Training]</b>     | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Ana Cruz</b>      | Training Impacted:     | <b>[CFP/WBT]</b>      | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Training</b>      | Migration Impact:      | <b>No</b>             | Funding Source ID:            |                            |
| Committee:                        | <b>[Training]</b>    | Approved by Committee: |                       | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Approved by Ana Cruz on October 13, 2020

**Expedite Approval:**  
**Current Design:** Eligibility Supervisor WBTs are impacted by system changes implemented with the 20.11 Production release.

**Request:** Eligibility Supervisor WBTs need to be updated to reflect system changes implemented with the 20.11 Production release.

**Recommendation:** Update the following Eligibility Supervisor WBTs to reflect changes implemented with the App Dev SCR(s) listed:  
1. 042-WBT-ELB-Eligibility Supervisor-01  
    a. CA-48393 (Add My Reports section on Home Page)  
    b. CA-214929 (Replace Utilities navigation bar)  
2. 042-WBT-ELB-Eligibility Supervisor-02  
    a. CA-48393 (Add My Reports section on Home Page)  
    b. CA-214929 (Replace Utilities navigation bar)

## Outreach

### Description:

### Migration Impact Description:

Updates to the existing LRS Web Based Training materials to support C-IV migration for CalSAWS are not in scope.

### Migration Impact Analysis:

### Alternative Procedure Description:

N/A

### Operational Impact:

**Estimate: 44**

|                                 |   |                    |   |                         |    |
|---------------------------------|---|--------------------|---|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 0  |
| DBA :                           | 0 | Design :           | 0 | Eligibility :           | 0  |
| Fiscal :                        | 0 | Forms Test :       | 0 | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :           | 0 | Performance :           | 0  |
| Release Communication Support : | 0 | Reports :          | 0 | Reports Test :          | 0  |
| Security :                      | 0 | Special Project :  | 0 | System Test Support :   | 0  |
| Tech Arch :                     | 0 | Tech Ops :         | 0 | Training :              | 44 |
| Translation :                   | 0 |                    |   |                         |    |

**Content Revision Status-1:** Accepted

**Content Revision Description-1:** 1. Recommendation Change:  
N/A

2. Estimate Change:

N/A

3. Release Change:  
Before: 20.11, Minor Version: 21.01.22  
After: 21.01, Minor Version: 21.03.19

4. Funding Source Change:  
N/A

**Content Revision  
Status-2:**

Accepted

**Content Revision  
Description-2:**

1. Recommendation Change:  
N/A

2. Estimate Change:  
N/A

3. Release Change:  
Before: Fix Version 21.01 Minor Release: 21.03.19  
After: Fix Version 21.03 Minor Release 21.05.21

4. Funding Source Change:  
N/A

**Content Revision  
Status-3:**

Pending CCB

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:

Update the following Eligibility Supervisor WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 042-WBT-ELB-Eligibility Supervisor-01
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)
2. 042-WBT-ELB-Eligibility Supervisor-02
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)

After:

Update the following Eligibility Supervisor WBTs to reflect changes implemented with the App Dev SCR(s) listed:

1. 042-WBT-ELB-Eligibility Supervisor-01
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)
  - c. CA-217839 (Update CalSAWS Branding; logos, text, text to speech and remove desk aid references in the last slides of the WBTs)
2. 042-WBT-ELB-Eligibility Supervisor-02
  - a. CA-48393 (Add My Reports section on Home Page)
  - b. CA-214929 (Replace Utilities navigation bar)
  - c. CA-217839 (Update CalSAWS Branding; logos, text, text to speech and remove desk aid references in the last slides of the WBTs)

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

# [CA-226000] DDID 34 FDS: Task Mgt - Legacy Task Category

- Resolved: 04/20/2021 04:16 PM

|                                   |                          |                        |                        |                               |                            |
|-----------------------------------|--------------------------|------------------------|------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>            | Assignee:              | <b>Minh Phan</b>       | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.03]</b>           | Designer Contact:      | <b>Mayuri Srinivas</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.04.22</b>          | Expedite Changes:      | <b>Start Build</b>     | Estimate:                     | <b>126</b>                 |
| Reporter:                         | <b>Justin Dobbs</b>      | Regulation Reference:  |                        | Created:                      | <b>03/04/2021 08:58 AM</b> |
| Status:                           | <b>In Production</b>     | Impact Analysis:       | <b>[N/A]</b>           | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sarah Cox</b>         | Training Impacted:     | <b>[Online Help]</b>   | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>         | Migration Impact:      | <b>No</b>              | Funding Source ID:            |                            |
| Committee:                        | <b>[Task Management]</b> | Approved by Committee: |                        | Other Agency Cross Reference: |                            |

**Non-Committee**

**Review:**

**Expedite Approval:** JoAnne Osborn - 3/25/2021

**Current Design:** The C-IV and CalSAWS Systems both support customizable Task Types via the Task Type Detail page. SCR CA-214928 introduced customizable Task Types to the CalSAWS System per DDID 34 in November of 2020. Task Types within the CalSAWS System are required to be associated to a Task Category. A Task Type Task Category attribute does not exist in the C-IV System.

**Request:** Introduce a new Task Category that will be associated to converted Task Types. This attribute is necessary to support Task assignment and distribution functionality in the CalSAWS System.

**Recommendation:** 1. Add a Legacy Task Category to the CalSAWS System to support converted Task Types.

**Outreach**

**Description:**

**Migration Impact Description:** The new Unified Task Management Solution will be integrating task configurability which will be administered through the front-end of the application.

**Migration Impact**

**Analysis:**  
**Alternative Procedure** N/A

**Description:**

**Operational Impact:**  
**Estimate:** 126

|                                 |   |                    |    |                         |    |
|---------------------------------|---|--------------------|----|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces : | 0  | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0  | Client Correspondence : | 0  |
| DBA :                           | 0 | Design :           | 0  | Eligibility :           | 0  |
| Fiscal :                        | 0 | Forms Test :       | 0  | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :           | 96 | Performance :           | 0  |
| Release Communication Support : | 0 | Reports :          | 0  | Reports Test :          | 0  |
| Security :                      | 0 | Special Project :  | 0  | System Test Support :   | 30 |
| Tech Arch :                     | 0 | Tech Ops :         | 0  | Training :              | 0  |
| Translation :                   | 0 |                    |    |                         |    |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change:  
Removed "Worklist PR RE" page from the list that consists of "Legacy" Task Category dropdown menu in section 2.1.2.1. Reference the attached design document.

2. Estimate Change: N/A

- 3. Release Change: N/A
- 4. Funding Source Change: N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

- 1. Recommendation Change:  
Before:  
After:

- 2. Estimate Change:  
Before:  
After:

- 3. Release Change:  
Before:  
After:

- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

- 1. Recommendation Change:  
Before:  
After:

- 2. Estimate Change:  
Before:  
After:

- 3. Release Change:  
Before:  
After:

- 4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

- 1. Recommendation Change:  
Before:  
After:

- 2. Estimate Change:  
Before:  
After:

- 3. Release Change:  
Before:  
After:

- 4. Funding Source Change:  
Before:  
After:

## [CA-207026] Migrate C-IV Contact Center Functionality

|                                   |                                   |                        |                              |                               |   |
|-----------------------------------|-----------------------------------|------------------------|------------------------------|-------------------------------|---|
| Team Responsible:                 | <b>Contact Center</b>             | Assignee:              | <b>Raji Sanuvala</b>         | SPG Status:                   | <b>No</b>   |
| Fix Version/s:                    | <b>[21.05]</b>                    | Designer Contact:      | <b>Jared Kuester</b>         | Change Type (SCR):            | <b>Enhancement</b>  |
| Minor Version:                    |                                   | Expedite Changes:      | <b>No</b>                    | Estimate:                     | <b>3516</b>   |
| Reporter:                         | <b>Roger Perez</b>                | Regulation Reference:  |                              | Created:                      | <b>03/08/2019 12:59 PM</b>  |
| Status:                           | <b>System Test</b>                | Impact Analysis:       | <b>[N/A]</b>                 | Outreach Required:            | <b>Yes</b>  |
| Policy/Design Consortium Contact: | <b>Darcy Alexander</b>            | Training Impacted:     | <b>[N/A]</b>                 | Funding Source:               | <b>Premise</b>  |
| Project Phase (SCR):              | <b>Migration</b>                  | Migration Impact:      | <b>Yes</b>                   | Funding Source ID:            | <b>CO-110</b>   |
| Committee:                        | <b>[IVR &amp; Contact Center]</b> | Approved by Committee: | <b>2021-04-28 00:00:00.0</b> | Other Agency Cross Reference: | <b>CIV-103540, CIV-103539, CIV-103666, CIV-103667, CIV-103668, CIV-103669, CIV-103670, CIV-103671, CIV-103672, CIV-103673, CIV-103674, CIV-103675, CIV-103676, CIV-103677, CIV-103678, CIV-103679</b> |

**Non-Committee Review:** SCR Approved - D.Alexander 1-27-2021 2nd Content Revision Committee Approved 4-28-2021

**Expedite Approval:**  
**Current Design:** The C-IV County Amazon Connect contact center solution communicates with the C-IV Database for self service information. The custom CCP pulls information from C-IV to validate security rights. And the Call flows mention "4 digit" IVR PINs.

**Request:** Migrate the C-IV counties contact center solution to work with the CalSAWS application.

**Recommendation:**

- Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
  - This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
  - Update Custom\_ResendFormWebserviceLambda to not allow reprinting of forms generated before 9/26/2021.
- Update the IVR PIN Prompt to remove the "4 digit" reference.
- Update Custom CCP screen-pop environment variables.

**Outreach Description:** The IVR/Contact Center Committee has been informed of the change.

**Migration Impact Description:** This SCR will migrate the C-IV county's contact center solution to work with the CalSAWS application.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** **3516**

|                  |   |                    |   |                         |   |
|------------------|---|--------------------|---|-------------------------|---|
| Automated Test : | 0 | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :       | 0 | CalHEERS Test :    | 0 | Client Correspondence : | 0 |

|                                 |      |                   |     |                       |     |
|---------------------------------|------|-------------------|-----|-----------------------|-----|
| DBA :                           | 0    | Design :          | 0   | Eligibility :         | 0   |
| Fiscal :                        | 0    | Forms Test :      | 0   | Imaging :             | 0   |
| IVR/CC :                        | 1428 | Online :          | 100 | Performance :         | 0   |
| Release Communication Support : | 0    | Reports :         | 0   | Reports Test :        | 0   |
| Security :                      | 0    | Special Project : | 0   | System Test Support : | 632 |
| Tech Arch :                     | 1356 | Tech Ops :        | 0   | Training :            | 0   |
| Translation :                   | 0    |                   |     |                       |     |

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change:  
Before:  
1. Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
  - a. This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
 2. Update the Custom CCP to validate user against CalSAWS  
 3. Update the IVR PIN Prompt to remove the "4 digit" reference.  
 4. Update Custom CCP screen-pop environment variables  
 After:  
 1. Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
  - a. This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
  - b. Update Custom\_ResendFormWebserviceLambda to not allow reprinting of forms generated before 9/26/2021.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda.
 2. Update the IVR PIN Prompt to remove the "4 digit" reference.  
 3. Update Custom CCP screen-pop environment variables.
  
2. Estimate Change:  
Before: N/A  
After: N/A
  
3. Release Change:  
Before: N/A  
After: N/A
  
4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision Status-2:** Pending CCB

**Content Revision Description-2:**

1. Recommendation Change:  
Before:  
1. Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
  - a. This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
  - b. Update Custom\_ResendFormWebserviceLambda to not allow reprinting of forms generated before 9/26/2021.
 2. Update the IVR PIN Prompt to remove the "4 digit" reference.  
 3. Update Custom CCP screen-pop environment variables.  
 After:  
 1. Update the Self Service Lambdas from Java to Node.js to communicate directly with the CalSAWS application database.
  - a. This includes updating the IVR PIN lambdas to accept 4 and 6 digit PINs.
  - b. Update Custom\_ResendFormWebserviceLambda to not allow reprinting of forms generated before 9/26/2021.
  - c. Add new Phone Number lookup lambda, and Get Case List lambda.
 2. Update Custom CCP.
  - a. Update the CCPAgent, CCPSupervisor, and CCPMessage of the day to ForgeRock roles.
  - b. Update the CCP Environemnt Variable to open CalSAWS rather than C-IV.
 3. Update the Prompts to remove the "4 digit" IVR PIN reference, and update C4Yourself to BenefitsCal.  
 4. Modify the Authentication Method in the IVR to no longer require Case Number as CalSAWS case numbers contain letters.

a. See attached Call Flows for details.

2. Estimate Change:

Before: N/A

After: N/A

3. Release Change:

Before: 21.05

After: 21.07

4. Funding Source Change:

Before: N/A

After: N/A

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:



# [CA-207394] DDID 1049 - Migrate Existing C-IV and LRS OBIEE Dashboards (Hard Launch #4)

|                                   |                                    |                        |                          |                               |                            |
|-----------------------------------|------------------------------------|------------------------|--------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Analytics</b>                   | Assignee:              | <b>Amanda Batt</b>       | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.05]</b>                     | Designer Contact:      | <b>Stan Anderson [X]</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    | <b>21.06.15</b>                    | Expedite Changes:      | <b>No</b>                | Estimate:                     | <b>62</b>                  |
| Reporter:                         | <b>Ravneet Bhatia</b>              | Regulation Reference:  |                          | Created:                      | <b>03/15/2019 10:03 AM</b> |
| Status:                           | <b>Development Complete</b>        | Impact Analysis:       | <b>[N/A]</b>             | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Camarena</b>             | Training Impacted:     | <b>[N/A]</b>             | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>                   | Migration Impact:      |                          | Funding Source ID:            |                            |
| Committee:                        | <b>[Management Reports, Other]</b> | Approved by Committee: |                          | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Approval from Laura Chavez <ChavezL> on 02/09/2021.

**Expedite Approval: Current Design:** Currently, existing C-IV and LRS Dashboards are in OBIEE. Once migrated, they will be in Qlik.

**Request:** The CONTRACTOR shall migrate the existing C-IV and LRS OBIEE dashboards into the CalSAWS Software Solution so all dashboards will be available to all 58 Counties. There will be a set of OBIEE dashboards for all 58 Counties and all counties shall utilize those dashboards which are applicable to their business process.

- Recommendation:**
- Migrate the following dashboards:
    - Regional Contact Center Dashboard (Removed)
    - Call Log Dashboard
    - WPR and Engagement Dashboard
    - Semi-Annual Reporting Dashboard
    - Caseload Inventory Dashboard (Removed)
    - Engagement Analysis Report (State & Management Report)
    - Longitudinal Analysis Report (State & Management Report)
  - Update CalSAWS OBIEE to display a single County Hierarchy throughout all dashboards. The hierarchy will be as follows: County/Division/Office/Unit/Worker
  - Update the connection information and provide DBLINK in each mapping to allow for scalability and performance for the 58 Counties.
  - Create a DBLINK to allow for scalability and performance and provide support for the 58 Counties.
  - Perform a one time connection information configuration change.

For this Hard Launch, the following dashboards will be deployed:  
 C-IV Call Log  
 C-IV Semi Annual Reporting  
 C-IV WPR and Engagement  
 LRS Reception Log (C-IV Lobby Management)

**Outreach Description:**  
**Migration Impact Description:**  
**Migration Impact Analysis:**  
**Alternative Procedure Description:**  
**Operational Impact:**  
**Estimate:** 62

Automated Test : 0      Batch/Interfaces : 0      Batch Operations : 0

|                                 |   |                   |    |                         |   |
|---------------------------------|---|-------------------|----|-------------------------|---|
| CalHEERS :                      | 0 | CalHEERS Test :   | 0  | Client Correspondence : | 0 |
| DBA :                           | 0 | Design :          | 0  | Eligibility :           | 0 |
| Fiscal :                        | 0 | Forms Test :      | 0  | Imaging :               | 0 |
| IVR/CC :                        | 0 | Online :          | 0  | Performance :           | 0 |
| Release Communication Support : | 0 | Reports :         | 62 | Reports Test :          | 0 |
| Security :                      | 0 | Special Project : | 0  | System Test Support :   | 0 |
| Tech Arch :                     | 0 | Tech Ops :        | 0  | Training :              | 0 |
| Translation :                   | 0 |                   |    |                         |   |

**Content Revision Status-1:** Accepted

**Content Revision Description-1:**

1. Recommendation Change: Moved 2 State & Management reports from Release G to Release H. Before: Engagement Analysis Report (State & Management Report) and Longitudinal Analysis Report (State & Management Report) were included. After: Engagement Analysis Report (State & Management Report) and Longitudinal Analysis Report (State & Management Report) removed.
2. Estimate Change: N/A
3. Release Change: Update the Minor version from 21.07.02 to 21.06.15, so that this DDID SCR could be deployed with the respective "Hard Launch" schedule. Fix Version 21.05 remains unchanged.  
Before: 21.07.02  
After: 21.06.15

**Content Revision Status-2:**

4. Funding Source Change: N/A  
Pending CCB

**Content Revision Description-2:**

1. Recommendation Change: N/A
2. Estimate Change: N/A
3. Release Change: The C-IV Dashboards will be going live for Hard-Launch on 09/02/2021.  
Before: 21.05 (21.06.15)  
After: 21.07 (21.09.02)
4. Funding Source Change: N/A

**Content Revision Status-3:**

**Content Revision Description-3:**

1. Recommendation Change:  
Before:  
After:
2. Estimate Change:  
Before:  
After:
3. Release Change:  
Before:  
After:
4. Funding Source Change:  
Before:  
After:

**Content Revision Status-4:**

**Content Revision Description-4:**

1. Recommendation Change:  
Before:  
After:



# [CA-207637] ACL 19-93 - ABAWD - Phase III

- Resolved: 03/28/2021 12:36 PM

|                                   |                            |                        |                                  |                               |                            |
|-----------------------------------|----------------------------|------------------------|----------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Eligibility</b>         | Assignee:              | <b>Praveen Badabhagni</b>        | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.05]</b>             | Designer Contact:      | <b>Mark Keehn [X]</b>            | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:                    |                            | Expedite Changes:      | <b>Start Build</b>               | Estimate:                     | <b>8511</b>                |
| Reporter:                         | <b>Jason M. Francis</b>    | Regulation Reference:  | <b>ACL 19-93</b>                 | Created:                      | <b>03/28/2019 03:20 PM</b> |
| Status:                           | <b>System Test</b>         | Impact Analysis:       | <b>[Central Print, Security]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Caroline Bui</b>        | Training Impacted:     | <b>[Job Aid, Online Help]</b>    | Funding Source:               | <b>Premise</b>             |
| Project Phase (SCR):              | <b>Production</b>          | Migration Impact:      | <b>No</b>                        | Funding Source ID:            | <b>ABAWD</b>               |
| Committee:                        | <b>[CaWORKs/ CalFresh]</b> | Approved by Committee: | <b>2020-12-17 00:00:00</b>       | Other Agency Cross Reference: |                            |

## Non-Committee

### Review:

### Expedite Approval:

JoAnne Osborn approved on 12/18/2020, Content Revision 1 approved by Karen Rapponotti on 3/15/2021

### Current Design:

Currently a user is required to define whether a non-exempt ABAWD is meeting or not meeting the work requirement. This is accomplished by updating the ABAWD Time Limit Month Detail page, or, in some scenarios, by defining the work requirement from the CF EDBC page.

### Request:

Automate the ABAWD work requirement determination.  
Make updates to the Work Registration Exemption logic and ABAWD Status logic.

### Recommendation:

- Online
1. Update Left Navigation - All stand-alone ABAWD pages will be gathered under a single collapsible task navigation section.
  2. Add a new ABAWD Requirement Summary page. The ABAWD Requirement Summary page displays a list of ABAWD records for the household within a given month. This list will be displayed at the case level with the appropriate ABAWD information.
  3. Add a new ABAWD Requirement Person Summary page. This page provides details related to a person's ABAWD Status, including work registration exemptions and how their work requirement status was determined.
  4. Add a new Local Minimum Wage List page. The Local Minimum Wage List page displays a list of records that have been created through the Local Minimum Wage Detail page and provides access to that page.
  5. Add a new Local Minimum Wage Detail page. The Local Minimum Wage Detail page captures, displays, and manages the fields for Local Minimum Wage.
  6. Add a new ABAWD Exemption List page. The ABAWD Exemption List page allows users to view and manage manual ABAWD exemptions.
  7. Add a new ABAWD Exemption Detail page. The ABAWD Exemption Detail page captures and manages manual exemptions for the participant.
  8. Add a new Workfare Requirement Calculator page. The Workfare Requirement Calculator page will be used to allow the user to run and display the Workfare Requirement.
  9. Add a new Non-Scheduled Activities List page. The Non-Scheduled Activities List page is used to track non-CFET activities of participants which are not scheduled by a CalFresh Employment and Training (E&T) worker.
  10. Add a new Non-Scheduled Activity Detail page. The Non-Scheduled Activity Detail page captures, displays, and manages the fields for Non-Scheduled Activities.
  11. Add a new Non-Scheduled Activity Hours Detail page. The Non-Scheduled Activity Hours Detail page captures, displays, and manages monthly hours for Non-Scheduled Activities.
  12. Update the Employment Hours page to allow the capture of zero hours and an indicator for when to 'Use Self-Employment Calculation for ABAWD'.
  13. Update the Activity Hours page to allow the capture of zero hours.

### Eligibility

14. Update the ABAWD Status section of the CF EDBC Summary page to account for the work requirement being determined by the system.

15. Add a new ABAWD Requirement Person Summary page. This page provides details related to a person's ABAWD Status, including work registration exemptions and how their work requirement result was determined. This page is only viewable from the CF EDBC Summary page.
  16. Add new logic to determine whether a non-exempt ABAWD who is not geographically waived has met the Work Requirement.
  17. Update the Work Registration exemption logic to prevent more than one person from being identified as exempt for 'Cares for Dependent Child Under 6'. Existing logic will allow anyone who has care and control of a qualifying child to receive this exemption.
  18. Update the ABAWD Status logic to include the following changes:
    - a. Treat a person receiving TCF as a Non ABAWD with a reason of TCF.
    - b. Treat a person manually identified by the user as 'Applied for Disability Benefits' as an Exempt ABAWD with a reason of 'Applied for Disability Benefits'.
    - c. Treat a person manually identified by the user as 'Participating in an ORR Training Program at Least Half Time' as an Exempt ABAWD with a reason of 'Participating in an ORR Training Program at Least Half Time'.
- Batch
19. Update the Super Trigger process and subsequent data collection changes required to identify cases for ABAWD Determination reevaluation.
  20. Update the ABAWD Determination Sweep logic to account for new ABAWD data triggers.
  21. Update the ABAWD Time Limit Sync Job to account for new ABAWD Status and ABAWD Status Reasons.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

C-IV feedback has been addressed and the design has been approved through the CW/CF Committee. The C-IV counties will be adopting this functionality as part of migration.

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

In the absence of this change, the user will be required to continue to manually define whether the ABAWD work requirement was met. This is done by the user manually setting this information on the Time Limit page.

**Operational Impact:**

**Estimate:**

**8511**

|                                 |     |                    |      |                         |      |
|---------------------------------|-----|--------------------|------|-------------------------|------|
| Automated Test :                | 0   | Batch/Interfaces : | 281  | Batch Operations :      | 0    |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0    | Client Correspondence : | 0    |
| DBA :                           | 0   | Design :           | 1675 | Eligibility :           | 1430 |
| Fiscal :                        | 628 | Forms Test :       | 0    | Imaging :               | 0    |
| IVR/CC :                        | 0   | Online :           | 1403 | Performance :           | 0    |
| Release Communication Support : | 580 | Reports :          | 0    | Reports Test :          | 0    |
| Security :                      | 0   | Special Project :  | 0    | System Test Support :   | 1427 |
| Tech Arch :                     | 0   | Tech Ops :         | 0    | Training :              | 200  |
| Translation :                   | 0.0 |                    |      |                         |      |

**Content Revision**

Accepted

**Status-1:**

**Content Revision**

**Description-1:**

1. Recommendation Change:  
Before:  
Multiple instances throughout design doc:
  - All instances of the name format "[Last], [First] [Age][Gender]"
  - Some instances of Security Groups wording did not match the Security Matrix's wording
  - All instances of "household participants" needed to be changed for clarification
 Section 2.1.3
3. Move the existing 'ABAWD Status 'option beneath the collapsible ABAWD section.  
Section 2.4.3:
  - 'To' field description was missing a validation for dates being entered
  - Default sort order for the results table was missing from the description section
 Section 2.5.3:
  - 'End Month' field description was missing a validation for dates being entered
  - 'Save and Return Button' was missing effective dating logic wording
 Section 2.6.3

- 'To' field description was missing a validation for dates being entered
- Default sort order for the results table was missing from the description section
- Participants are referred to as Household Participants in the Exemption List page descriptions
- Section 2.7.3
- 'Name' field description was missing wording about it being a required field
- Participants are referred to as Household Participants in the Exemption Detail page descriptions
- Section 2.8.3
- 'Benefit Allotment' field description was missing the standard money constraint language and validation
- 'Minimum Wage' field description was missing the standard money constraint language and validation
- 'Calculate Button' description was missing clarification language regarding rounding language
- Section 2.13.3
- 3. Update the Validation message that triggers when a value is less than 0.1 to allow for 0 hours, up to 2 decimal places.
  - a. Change the Month validation to "Month values must range between 0 to 400"
  - b. Change the validation message for weekly values to "Weekly values must range between 0 to 99.99"
- Section 2.20.2
- Description #1.a.ii Customer Activity associated to a CFET or GROW program

After:

Multiple instances throughout design doc:

- All instances of the name format changed to "[Last], [First] [Age] [Gender Initial]"
- Some instances of Security Groups updated to match the security matrix verbatim
- Section 1.4
- Added assumption 1: "Fields not mentioned to be modified within the description of changes will retain their current functionality and logic."
- Added assumption 5: "Additional changes to CFET service types will be implemented as a future enhancement through CA-205009. Additional updates will also be applied to the Stat 47."
- Updated assumption 11: "Hours entered for a component other than Supervised Job Search / Job Club will be qualifying hours for that component. When entering hrs., if Job Club/Job Search is part of the CFET activity, the worker will have to make sure the Job Club/Job Search hrs. should not be more than 50% of the total hours of the component, as per CRPC #2233."
- Added assumption 12: "The system will not display ABAWD Work Requirement Detail information for a Partial Month."
- Section 2.1.3
- Change the description of changes in 2.1.3.3 to remove "beneath" with "within" --> "ABAWD Status 'option within the collapsible ABAWD section"
- Section 2.4.3:
- Added the validation "To date must be after the From date" to the 'To' field description
- Changed Household Participants' to 'CalFresh Program participants'
- Added the following sort order to the 'Begin Month' field description: "This table will be ordered by this column and the default order upon load will be descending"
- Section 2.5.3:
- Added the validation "End Month must be after the Begin Month" to the 'End Month' field description
- Added the following effective dating language to the 'Save and return Button' description: "Effective dating logic (non-continuous) will apply to this data so that there are no overlapping records, but we will not require a high-dated record"
- Section 2.6.3
- Added the validation "To date must be after From date" to the 'To' field description
- Changed Household Participants' to 'CalFresh Program participants'
- Added the following sort order to the 'Begin Date' field description: "This column will be the table's default sort order by descending"
- Section 2.7.3
- Added the following wording to the 'Name' field description: "This is a required field"
- Changed Household Participants' to 'CalFresh Program participants'
- Add the following validation to the "End Date" field: "Add a validation stating that the "End Date must be after the Begin Date."
- Added a "Close Button" with its description
- Added an "Edit" button with its description
- Section 2.8.3
- Added the following language to the 'Benefit Allotment' field description: "This will follow the system standard money constraint of 'XX.XX', negative values will not be accepted. Add a validation that states "Value must be

greater than 0". The trigger for this validation is when the Calculate Button is selected and the value of the 'Benefit Allotment' is less than or equal to 0. This is a required field."

- Added the following language to the 'Minimum Wage' field description: "This will follow the system standard money constraint of 'XX.XX', negative values will not be accepted. Add a validation that states "Value must be greater than 0". The trigger for this validation is when the Calculate Button is selected and the value of the 'Minimum Wage' is less than or equal to 0. This is a required field."

- Added the following language to the 'Calculate Button' description: "These hours will be rounded down to the whole number (e.g., 4.55 will be rounded down to 4)."

#### Section 2.10

- Added removal check boxes to the results table.

- Added a month drop down selector which will display applicable months to add or edit hours for the activity.

- Added validations for when the user changes the end or start dates and there are reported hours outside of the new date range.

- Added an "Edit Button" with it's description.

#### 2.11

- Modified the validation language for the hour entry fields, as well as validation for the save and return button.

- Modified the language for the dropdown month selector for the page when in view mode.

#### Section 2.12.3

- Added the following change: "Update the Month Dropdown – Update the month dropdown to display all months from the employment's 'Date Hired' month to one month after the current system date's month if there is no 'Termination Date'."

#### Section 2.13.3

- Removed the original scope of updating the validation message to the following changes:

1. Add the Validation message "Month values must range between 0.00 to 400.00.", this will trigger when a value is greater than 400 in the Total Monthly Hours field.

2. Add the validation message "Weekly values must range between 0.00 to 99.99.", this will trigger when a value is greater than 99.99 in a 'Weekly Value field'.

#### Section 2.14

Added a Source column to the ABAWD Status section of the EDBC.

Added note that a hyperlink will not exist for historical records.

#### Section 2.16

Added details regarding a user/system ABAWD determination.

Removed some countable customer activity records and updated the program association for others.

Added clarification for mid-month BDA logic

#### Section 2.22

Added section to rename ABAWD time limit status

#### Section 2.23

Removed section

#### Section 2.20.2

- Updated Description #1.a.ii Customer Activity associated to a WPR, CFET or GROW program

#### 2. Estimate Change:

Before: Estimate: 9052

Release Communication Support: 366

Batch/Interfaces ETC 1: 241

Batch/Interfaces ETC Total: 276

Training ETC 1: 350

After: Estimate: 8,511

Batch/Interfaces ETC 1: 246

Batch/Interfaces ETC Total: 281

Training ETC 1: 170

There were 2 fields to capture release communication support hours. "Release Communication Support", which is an older field is no longer included in the estimate.

Pending CCB

#### **Content Revision Status-2:**

#### **Content Revision Description-2:**

1. Recommendation Change:

Before:

Section 2.11.3.5

5. When navigating to the Non-Scheduled Activity Hours Detail page the Actual Hours Information will be collapsed.

After:

In order to address defect CA-227815 updated Section 2.11.3.5 to make the section display as collapsed or expanded dynamically:  
5. When navigating to the Non-Scheduled Activity Hours Detail page the Actual Hours Information will be collapsed when in 'View' mode and the total monthly hours field is equal to 0. The page will default to be expanded when the total monthly hours field is greater than 0 or anytime the page is in 'Edit' mode.

2. Estimate Change:  
N/A

3. Release Change:  
N/A

4. Funding Source Change:  
N/A

**Content Revision  
Status-3:  
Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:  
Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-222989] ID fields in the CalSAWS Application need to be updated to support larger values.

- Resolved: 03/28/2021 12:39 PM

|                                   |                      |                        |                       |                               |                            |
|-----------------------------------|----------------------|------------------------|-----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Online</b>        | Assignee:              | <b>Emanuel Rivers</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.05]</b>       | Designer Contact:      | <b>Philip McGinty</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                      | Expedite Changes:      | <b>Start Build</b>    | Estimate:                     | <b>195</b>                 |
| Reporter:                         | <b>Matthew Lower</b> | Regulation Reference:  |                       | Created:                      | <b>12/17/2020 06:51 PM</b> |
| Status:                           | <b>Test Complete</b> | Impact Analysis:       | <b>[N/A]</b>          | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Dymas Pena</b>    | Training Impacted:     | <b>[N/A]</b>          | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>     | Migration Impact:      | <b>No</b>             | Funding Source ID:            |                            |
| Committee:                        | <b>[Usability]</b>   | Approved by Committee: |                       | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Dymas P 02/17/2021

**Expedite Approval:** Approved by Karen J. Rapponotti on 3/9/2021

**Current Design:** ID fields in the CalSAWS system vary in length allowed on the page, when being searched. Currently, there is a concern over ID numbers being converted that will be a larger value than can be supported. This can be solved by increasing the value of IDs that can be searched for specific fields.

**Request:** Update the searchable ID fields in CalSAWS that do not support a search of 10 digits, to allow for a search of up to 10 digits.

- Recommendation:**
1. Update the applicable ID fields to support a search of up to 10 digits
  2. Update the length of the Staff ID fields to be able to display 10 digits

### Outreach

#### Description:

#### Migration Impact

#### Description:

Update to CalSAWS data model and field definitions to allow for larger sized primary keys. This change is only required in CalSAWS, as C-IV primary key values remain the same size, until they are converted to CalSAWS as part of C-IV migration.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

**Estimate: 195**

|                                 |   |                    |     |                         |    |
|---------------------------------|---|--------------------|-----|-------------------------|----|
| Automated Test :                | 0 | Batch/Interfaces : | 0   | Batch Operations :      | 0  |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0   | Client Correspondence : | 0  |
| DBA :                           | 0 | Design :           | 25  | Eligibility :           | 0  |
| Fiscal :                        | 0 | Forms Test :       | 0   | Imaging :               | 0  |
| IVR/CC :                        | 0 | Online :           | 100 | Performance :           | 0  |
| Release Communication Support : | 9 | Reports :          | 0   | Reports Test :          | 0  |
| Security :                      | 0 | Special Project :  | 0   | System Test Support :   | 53 |
| Tech Arch :                     | 0 | Tech Ops :         | 8   | Training :              | 0  |
| Translation :                   | 0 |                    |     |                         |    |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change:

Before:

Section 2.1.3

- Scope included updating the "Job Order ID" field on the "Job Order Search Detailed Results" page

After:

- Removed this scope from section 2.1.3 as a change to the "Job Order Search Detailed Results" page is not necessary. No change in estimate as it is a very minor change.

2. Estimate Change:

N/A

3. Release Change:

N/A

4. Funding Source Change:

N/A

**Content Revision  
Status-2:**

**Content Revision  
Description-2:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:

Before:

After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:

Before:

After:

2. Estimate Change:

Before:

After:

3. Release Change:

Before:

After:

4. Funding Source Change:



# [CA-224280] Automated Regression Test - Execution and Maintenance - 21.05 Release Cycle

|                                   |                             |                        |                         |                               |                                |
|-----------------------------------|-----------------------------|------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible:                 | <b>Automated Test</b>       | Assignee:              | <b>William Baretsky</b> | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:                    | <b>[21.06]</b>              | Designer Contact:      | <b>William Baretsky</b> | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:                    | <b>21.07.21</b>             | Expedite Changes:      | <b>Start Build</b>      | Estimate:                     | <b>560</b>                     |
| Reporter:                         | <b>William Baretsky</b>     | Regulation Reference:  |                         | Created:                      | <b>01/26/2021 12:33 PM</b>     |
| Status:                           | <b>Development Complete</b> | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                      |
| Policy/Design Consortium Contact: | <b>JoAnne Osborn</b>        | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>LRS M&amp;E</b>             |
| Project Phase (SCR):              | <b>Assembly Test</b>        | Migration Impact:      | <b>No</b>               | Funding Source ID:            |                                |
| Committee:                        | <b>[Other]</b>              | Approved by Committee: |                         | Other Agency Cross Reference: | <b>CIV-108548</b>              |

**Non-Committee Review:**

JoAnne Osborn 2/11/2021

**Expedite Approval:**

JoAnne Osborn 2/11/2021

**Current Design:**

A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:**

The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

**Recommendation:**

1. Execute the major release automated regression suite against the 21.05 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 21.05 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 21.05 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

**Outreach**

**Description:**

**Migration Impact Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact Analysis:**

Accounted for in SOR

**Alternative Procedure Description:**

Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate:**

**560**

|                                 |     |                    |   |                         |   |
|---------------------------------|-----|--------------------|---|-------------------------|---|
| Automated Test :                | 560 | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0 | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0 | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0 | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0 | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0 | Reports Test :          | 0 |
| Security :                      | 0   | Special Project :  | 0 | System Test Support :   | 0 |

Tech Arch : 0 Tech Ops : 0 Training : 0

Translation : 0

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change:  
Before:  
Automated Test ETC-4: 140  
Total Estimate: 560

After:  
Automated Test ETC-4: 220  
Total Estimate: 640

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:** 1. Recommendation Change:  
Before:

After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-3:**

**Content Revision Description-3:** 1. Recommendation Change:  
Before:

After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-4:**

**Content Revision Description-4:** 1. Recommendation Change:  
Before:

After:

2. Estimate Change:  
Before:



# [CA-50300] Update CalSAWS Transportation Type Dropdown on the Need Detail Page

|                                   |                              |                        |                  |                               |                            |
|-----------------------------------|------------------------------|------------------------|------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>                | Assignee:              | <b>Emma Wong</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.07]</b>               | Designer Contact:      | <b>Jimmy Tu</b>  | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                              | Expedite Changes:      | <b>No</b>        | Estimate:                     | <b>188</b>                 |
| Reporter:                         | <b>Jira Cleanup</b>          | Regulation Reference:  |                  | Created:                      | <b>01/19/2018 11:44 AM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:       | <b>[N/A]</b>     | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gingko Luna</b>           | Training Impacted:     | <b>[N/A]</b>     | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:      | <b>No</b>        | Funding Source ID:            |                            |
| Committee:                        | <b>[Welfare to Work/WPR]</b> | Approved by Committee: |                  | Other Agency Cross Reference: |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Workers are currently required to authorize certain Transportation Need Types as "Other" which will require additional county staff review. This impacts the county staff's workload and requires additional wait time for participants to receive their transportation payments.

**Request:** 1. Update the Transportation Need Types on the Need Detail Page in the CalSAWS.

2. Update the NA 820 form to reflect the appropriate information.

**Recommendation:** 1. Update the Transportation Need Types on the Need Detail Page for county staff to select the appropriate transportation need type.

2. Generate NA 820 to reflect the appropriate information on transportation payment type issued.

### Outreach

**Description:**  
**Migration Impact Description:** C-IV feedback has been addressed and the design has been approved through the WTW Committee. The C-IV counties will be adopting this functionality as part of migration.

### Migration Impact

**Analysis:**  
**Alternative Procedure Description:** N/a

**Operational Impact:**  
**Estimate:** **188**

|                                 |    |                    |   |                         |    |
|---------------------------------|----|--------------------|---|-------------------------|----|
| Automated Test :                | 0  | Batch/Interfaces : | 0 | Batch Operations :      | 0  |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0 | Client Correspondence : | 68 |
| DBA :                           | 0  | Design :           | 0 | Eligibility :           | 0  |
| Fiscal :                        | 55 | Forms Test :       | 0 | Imaging :               | 0  |
| IVR/CC :                        | 0  | Online :           | 0 | Performance :           | 0  |
| Release Communication Support : | 0  | Reports :          | 0 | Reports Test :          | 0  |
| Security :                      | 0  | Special Project :  | 0 | System Test Support :   | 50 |
| Tech Arch :                     | 0  | Tech Ops :         | 0 | Training :              | 0  |
| Translation :                   | 0  |                    |   |                         |    |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: Before:

After: Spanish translations are required for the following transportation types: "Carpool", "Provider Transportation Service", "Vanpool", "Subway/Train/Rail" and "Rideshare".

2. ETC Change:

Before: Translation Resource ETC: 0

After: Translation Resource ETC: 2

**Content Revision**

**Status-2:**

**Content Revision**

**Description-2:**

**Content Revision**

**Status-3:**

**Content Revision**

**Description-3:**

**Content Revision**

**Status-4:**

**Content Revision**

**Description-4:**



# [CA-58579] ACWDL 17-31 Revisions to the NA Back 9 for all Medi-Cal Notices of Action

|                                   |                              |                        |                                 |                               |                            |
|-----------------------------------|------------------------------|------------------------|---------------------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Client Correspondence</b> | Assignee:              | <b>Quynh Nguyen</b>             | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.07]</b>               | Designer Contact:      | <b>Connor Gorry</b>             | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:                    |                              | Expedite Changes:      | <b>No</b>                       | Estimate:                     | <b>193</b>                 |
| Reporter:                         | <b>Ted Anderson</b>          | Regulation Reference:  | <b>ACWDL 17-31</b>              | Created:                      | <b>01/19/2018 11:41 AM</b> |
| Status:                           | <b>In Development</b>        | Impact Analysis:       | <b>[Forms/NOA Translations]</b> | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Virginia C. Bernal</b>    | Training Impacted:     | <b>[N/A]</b>                    | Funding Source:               | <b>LRS M&amp;E</b>         |
| Project Phase (SCR):              | <b>Migration</b>             | Migration Impact:      | <b>No</b>                       | Funding Source ID:            |                            |
| Committee:                        | <b>[Correspondence]</b>      | Approved by Committee: | <b>2020-01-23 00:00:00.0</b>    | Other Agency Cross Reference: | <b>CIV-10665</b>           |

## Non-Committee

### Review:

### Expedite Approval:

### Current Design:

Currently, per information provided by ESD-Client Correspondence, LRS generates two different NA Back 9's depending on the type of Medi-Cal program (MAGI or Non-MAGI) that eligibility is being evaluated for. This is due to the different contact information that is provided in order to request a hearing.

The current NA Back 9 used on all Medi-Cal NOAs is the, NA BACK 9 (REPLACES NA BACK 8 AND EP 5) (REVISED 4/2013. Depending on type of NOA that is generated (MAGI or Non-MAGI), the NA Back 9 will contain the following contact information to request a hearing under the, Ask for a Hearing Section:

#### MAGI NOAs

California Department of Social Services  
 State Hearing Division, ACAB  
 744 P Street, MC 9-17-97  
 Sacramento, CA 95814  
 OR  
 Call toll free: 1-855-795-0634 toll free, 1-800-952-8439 TDD, 1-916-651-2789 Fax

#### Non-MAGI NOAs

Appeals & Hearing Section  
 P.O. Box 18890  
 Los Angeles, CA 90018  
 OR  
 Call toll free: 1-800-952-5253 or for hearing or speech impaired who use TDD, 1-800-952-8349.

LRS is also currently programmed to populate contact information for local legal aid agencies on the NA Back 9.

### Request:

Replace the current NA Back 9 used on all Medi-Cal Notices of Action (NOAs) (MAGI and Non-MAGI) with the new "NA BACK 9 (ACA/ MEDI-CAL) (11/16)".

Ensure that LRS is programmed to generate Medi-Cal NOAs with the new NA Back 9 (both system and manually generated Medi-Cal NOAs).

### Recommendation:

The following changes are required:

Replace the current, NA BACK 9 (REPLACES NA BACK 8 AND EP 5) (REVISED 4/2013, being used on all Medi-Cal NOAs (both MAGI and Non-MAGI) with the new:

NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, released with ACWDL 17-31.

The new NA Back 9 will contain the following contact information for all Medi-Cal notices of action in the Ask for a Hearing Section:

California Department of Social Services  
 State Hearings Division, ACAB  
 744 P Street, MC 9-17-97  
 Sacramento, CA 95814  
 OR Fax to: 1-916-651-2789  
 Call toll free: 1-855-795-0634 or for hearing or speech impaired who use TDD, 1-800-952-8439

The new, NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, will be included on all system or manually generated Medi-Cal NOAs.

The new, NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, is to be used on all Medi-Cal NOAs available in English and threshold languages. Reference the attached English and threshold language versions of the NA BACK 9 (ACA/ MEDI-CAL) (11/16).

The new, NA BACK 9 (ACA/ MEDI-CAL) (11/16) version, will also be populated with the contact information for local legal aid agencies as currently programmed in LRS.

**Outreach**

**Description:**

**Migration Impact Description:**

This is an LRS-only SCR, intended to match a change that has already been made in the C-IV system. There should be no migration gaps created as a part of this change.

**Migration Impact**

**Analysis:**

**Alternative Procedure**

xxxx

**Description:**

**Operational Impact:**

**Estimate: 193**

|                                 |     |                    |    |                         |     |
|---------------------------------|-----|--------------------|----|-------------------------|-----|
| Automated Test :                | 0   | Batch/Interfaces : | 0  | Batch Operations :      | 0   |
| CalHEERS :                      | 0   | CalHEERS Test :    | 43 | Client Correspondence : | 142 |
| DBA :                           | 0   | Design :           | 0  | Eligibility :           | 0   |
| Fiscal :                        | 0   | Forms Test :       | 0  | Imaging :               | 0   |
| IVR/CC :                        | 0   | Online :           | 0  | Performance :           | 0   |
| Release Communication Support : | 0   | Reports :          | 0  | Reports Test :          | 0   |
| Security :                      | 0   | Special Project :  | 0  | System Test Support :   | 0   |
| Tech Arch :                     | 0   | Tech Ops :         | 0  | Training :              | 0   |
| Translation :                   | 8.0 |                    |    |                         |     |

**Content Revision Status-1:** Accepted

**Content Revision**

**Description-1:**

1. Recommendation Change:  
 Before: N/A  
 After: N/A

2. Estimate Change:  
 Before: N/A  
 After: N/A

3. Release Change:  
 Before: 20.07  
 After: TBD

4. Funding Source Change:  
 Before: N/A  
 After: N/A

**Content Revision**

**Status-2:**

Accepted

**Content Revision  
Description-2:**

1. Recommendation Change:  
Before: N/A  
After: N/A
2. Estimate Change:  
Before: N/A  
After: N/A
3. Release Change:  
Before: TBD  
After: 21.07
4. Funding Source Change:  
Before: Premise  
After: LRS M&E

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before: Recommendation 2.1 Update Medi-Cal NA Back 9  
  
After: Recommendation 2.1 Updates NA Back 9 for MAGI; Recommendation 2.2 Updates NA Back 9 for Medi-Cal Non-MAGI. Additional clarifications on impacted fragments has also been added.
2. Estimate Change:  
Before:  
Client Correspondence - 142  
CalHEERS Test - 43  
  
After:  
Client Correspondence - 185  
CalHEERS Test - 55
3. Release Change:  
N/A
4. Funding Source Change:  
N/A

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**



# [CA-207131] DDID 2208 - Add Appointments/Tasks Assigned to Unavailable Workers Dashboard

|                                   |                       |                        |                      |                               |                            |
|-----------------------------------|-----------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Reports</b>        | Assignee:              | <b>Robert Logan</b>  | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>        | Designer Contact:      | <b>Remi Lassiter</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                       | Expedite Changes:      | <b>Start Build</b>   | Estimate:                     | <b>625</b>                 |
| Reporter:                         | <b>Lynnel Silva</b>   | Regulation Reference:  |                      | Created:                      | <b>03/15/2019 10:02 AM</b> |
| Status:                           | <b>In Development</b> | Impact Analysis:       | <b>[Security]</b>    | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Carlos Zepeda</b>  | Training Impacted:     | <b>[Online Help]</b> | Funding Source:               | <b>CalSAWS DD&amp;I</b>    |
| Project Phase (SCR):              | <b>Migration</b>      | Migration Impact:      |                      | Funding Source ID:            |                            |
| Committee:                        | <b>[Other]</b>        | Approved by Committee: |                      | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Carlos Zepeda 4/6/2021

**Expedite Approval:** Expedited Start Build Approval provided by Karen J. Rapponotti on 4/8/2021

**Current Design:** There is currently no report or dashboard in CalSAWS which provides details on appointments or tasks assigned to unavailable workers.

**Request:** Add a dashboard that shows any appointments and tasks that are assigned to users that are not available at that time.

**Recommendation:** Implement a new Appointments/Tasks Assigned to Unavailable Workers Dashboard.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

**Migration Impact**

**Analysis:**

**Alternative**

**Procedure**

**Description:**

**Operational Impact:**

**Estimate:** 625

N/A - CalSAWS DD&I Requirement

|                                 |   |                    |     |                         |     |
|---------------------------------|---|--------------------|-----|-------------------------|-----|
| Automated Test :                | 0 | Batch/Interfaces : | 0   | Batch Operations :      | 0   |
| CalHEERS :                      | 0 | CalHEERS Test :    | 0   | Client Correspondence : | 0   |
| DBA :                           | 0 | Design :           | 0   | Eligibility :           | 0   |
| Fiscal :                        | 0 | Forms Test :       | 0   | Imaging :               | 0   |
| IVR/CC :                        | 0 | Online :           | 0   | Performance :           | 0   |
| Release Communication Support : | 0 | Reports :          | 450 | Reports Test :          | 175 |
| Security :                      | 0 | Special Project :  | 0   | System Test Support :   | 0   |
| Tech Arch :                     | 0 | Tech Ops :         | 0   | Training :              | 0   |
| Translation :                   | 0 |                    |     |                         |     |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** Language column removed from Appointments Sheet, specifically:  
 1. Figure 2.1.1 - Appointments/Tasks Assigned to Unavailable Workers Dashboard Mockup – Appointments Sheet updated to reflect removed column  
 2. Language removed from Appointment Sheet Column Definitions table in Section 2.2.3 Description of Change.

**Content Revision Status-2:**  
**Content Revision Description-2:**



# [CA-220977] Rekey Nuance Voice Biometrics Speaker ID, and Migrate Predictive Handling Batch Job

|                                   |                                   |                        |                      |                               |                            |
|-----------------------------------|-----------------------------------|------------------------|----------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Contact Center</b>             | Assignee:              | <b>Pramod Ramesh</b> | SPG Status:                   | <b>No</b>                  |
| Fix Version/s:                    | <b>[21.07]</b>                    | Designer Contact:      | <b>Jared Kuester</b> | Change Type (SCR):            | <b>Enhancement</b>         |
| Minor Version:                    |                                   | Expedite Changes:      | <b>No</b>            | Estimate:                     | <b>979</b>                 |
| Reporter:                         | <b>Jared Kuester</b>              | Regulation Reference:  |                      | Created:                      | <b>10/16/2020 02:07 PM</b> |
| Status:                           | <b>In Development</b>             | Impact Analysis:       | <b>[N/A]</b>         | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Darcy Alexander</b>            | Training Impacted:     | <b>[N/A]</b>         | Funding Source:               | <b>County Purchase</b>     |
| Project Phase (SCR):              | <b>Migration</b>                  | Migration Impact:      | <b>Yes</b>           | Funding Source ID:            | <b>CSC Support</b>         |
| Committee:                        | <b>[IVR &amp; Contact Center]</b> | Approved by Committee: |                      | Other Agency Cross Reference: |                            |

**Non-Committee Review:** Darcy Alexander 2-22-2021 SCR Approved

**Expedite Approval:**  
**Current Design:** The Nuance Voice Biometrics solution is housed in the C-IV Datacenter.

**Request:** Migrate the Nuance Voice Biometrics servers to AWS EC2

- Recommendation:**
1. Update Nuance Voice Print ID's to match rekeyed C-IV PERS\_IDs
    - a. The PERS\_ID matches the Nuance Speaker ID so these need to match following the rekey
  2. Migrate Predictive Handling Batch Job
    - a. Updates are made to the following tables.
      - i. AGGRUSR.PRDTVE\_HANDL\_DATA
      - ii. AGGRUSR.PRDTVE\_HANDL\_WEIGHT
    - b. Update PERS\_ID in PRDTVE\_HANDL\_DATA to have rekeyed values.
    - c. Install R on batch server to enable running R scripts.
    - d. Make any needed changes to Predictive Handling scripts for updating Predictive Handling weights for a more accurate prediction.

**Outreach**

**Description:**  
**Migration Impact Description:** This will migrate the Nuance Voice Biometrics solution from on-prem in C-IV to the AWS Cloud.

**Migration Impact Analysis:**  
**Alternative Procedure Description:** N/A

**Operational Impact:**  
**Estimate:** 979

|                                 |     |                    |    |                         |     |
|---------------------------------|-----|--------------------|----|-------------------------|-----|
| Automated Test :                | 0   | Batch/Interfaces : | 0  | Batch Operations :      | 0   |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0  | Client Correspondence : | 36  |
| DBA :                           | 0   | Design :           | 0  | Eligibility :           | 0   |
| Fiscal :                        | 0   | Forms Test :       | 0  | Imaging :               | 0   |
| IVR/CC :                        | 575 | Online :           | 40 | Performance :           | 0   |
| Release Communication Support : | 0   | Reports :          | 0  | Reports Test :          | 0   |
| Security :                      | 0   | Special Project :  | 0  | System Test Support :   | 158 |
| Tech Arch :                     | 170 | Tech Ops :         | 0  | Training :              | 0   |
| Translation :                   | 0   |                    |    |                         |     |

**Content Revision Status-1:** Accepted

**Content Revision  
Description-1:**

1. Recommendation Change:  
Before: Recommendation to generate the CSF 105 form through IVR is not available.  
After: Recommendation is added to implement business logic to be able to generate the CSF 105 form though IVR.

2. Estimate Change:  
Before:  
Client Correspondence ETC 1: 0  
System Test ETC 2: 0  
After:  
Client Correspondence ETC: 36  
System Test ETC 2: 14

3. Release Change:  
Before: 21.05  
After: 21.07

4. Funding Source Change:  
Before: N/A  
After: N/A

**Content Revision  
Status-2:**

Pending CCB

**Content Revision  
Description-2:**

1. Recommendation Change:  
Build clarifications are added as part of the Content Revision 2. The updates can be found in the 'CA-220977 - Rekey Nuance Voice Biometrics Speaker ID and migrate Predictive Handling Batch Job Content Revision 2.docx'

**Content Revision  
Status-3:**

**Content Revision  
Description-3:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision  
Status-4:**

**Content Revision  
Description-4:**

1. Recommendation Change:  
Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:



# [CA-224281] Automated Regression Test - Execution and Maintenance - 21.07 Release Cycle

|                                   |                         |                        |                         |                               |                                |
|-----------------------------------|-------------------------|------------------------|-------------------------|-------------------------------|--------------------------------|
| Team Responsible:                 | <b>Automated Test</b>   | Assignee:              | <b>William Baretsky</b> | SPG Status:                   | <b>Approved</b>                |
| Fix Version/s:                    | <b>[21.07]</b>          | Designer Contact:      | <b>William Baretsky</b> | Change Type (SCR):            | <b>Operational Enhancement</b> |
| Minor Version:                    | <b>21.11.17</b>         | Expedite Changes:      | <b>No</b>               | Estimate:                     | <b>960</b>                     |
| Reporter:                         | <b>William Baretsky</b> | Regulation Reference:  |                         | Created:                      | <b>01/26/2021 12:36 PM</b>     |
| Status:                           | <b>In Development</b>   | Impact Analysis:       | <b>[N/A]</b>            | Outreach Required:            | <b>No</b>                      |
| Policy/Design Consortium Contact: | <b>JoAnne Osborn</b>    | Training Impacted:     | <b>[N/A]</b>            | Funding Source:               | <b>LRS M&amp;E</b>             |
| Project Phase (SCR):              | <b>Assembly Test</b>    | Migration Impact:      | <b>No</b>               | Funding Source ID:            |                                |
| Committee:                        | <b>[Other]</b>          | Approved by Committee: |                         | Other Agency Cross Reference: | <b>CIV-108549</b>              |

**Non-Committee Review:** JoAnne Osborn 2/11/2021

**Expedite Approval: Current Design:**

A repository of automated regression scripts has been created and organized into test suites, with the purpose of validating major and minor version releases before they are deployed to production.

**Request:** The automated regression scripts should be executed and maintained on a regular basis, to validate the quality of each system version before it is released to production.

**Recommendation:**

1. Execute the major release automated regression suite against the 21.07 major version build on a regular basis.
2. Execute the major release automated regression suite against the final build for the 21.07 major version, prior to the build being deployed to production.
3. Execute the minor release automated regression suite against the final build of each applicable 21.07 minor version, prior to the build being deployed to production.
4. Update the test scripts within the major and minor release automated regression suites as needed to account for intentional design changes that would otherwise generate false negative results.

Note: Due to the lack of a 21.09 during C-IV County migration to CalSAWS, the 21.07 minor version cycle covers an extended four-month period from July 2021 through November 2021.

**Outreach**

**Description:**

**Migration Impact**

**Description:**

Per DDID #713, the existing LRS automated regression test scripts will be updated to account for the CalSAWS DD&I changes.

**Migration Impact**

**Analysis:**

Accounted for in SOR

**Alternative**

**Procedure**

**Description:**

Execute all regression testing manually for major and minor version releases.

**Operational Impact:**

**Estimate:**

**960**

|                                 |     |                    |   |                         |   |
|---------------------------------|-----|--------------------|---|-------------------------|---|
| Automated Test :                | 960 | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0 | Client Correspondence : | 0 |
| DBA :                           | 0   | Design :           | 0 | Eligibility :           | 0 |
| Fiscal :                        | 0   | Forms Test :       | 0 | Imaging :               | 0 |
| IVR/CC :                        | 0   | Online :           | 0 | Performance :           | 0 |
| Release Communication Support : | 0   | Reports :          | 0 | Reports Test :          | 0 |

|               |   |                   |   |                       |   |
|---------------|---|-------------------|---|-----------------------|---|
| Security :    | 0 | Special Project : | 0 | System Test Support : | 0 |
| Tech Arch :   | 0 | Tech Ops :        | 0 | Training :            | 0 |
| Translation : | 0 |                   |   |                       |   |

**Content Revision Status-1:** Pending CCB

**Content Revision Description-1:** 1. Recommendation Change: N/A

2. Estimate Change:  
Before:  
Automated Test ETC-4: 240  
Total Estimate: 960

After:  
Automated Test ETC-4: 360  
Total Estimate: 1080

3. Release Change: N/A

4. Funding Source Change: N/A

**Content Revision Status-2:**

**Content Revision Description-2:** 1. Recommendation Change:

Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-3:**

**Content Revision Description-3:** 1. Recommendation Change:

Before:  
After:

2. Estimate Change:  
Before:  
After:

3. Release Change:  
Before:  
After:

4. Funding Source Change:  
Before:  
After:

**Content Revision Status-4:**

**Content Revision Description-4:** 1. Recommendation Change:

Before:  
After:

2. Estimate Change:

**End Content Revisions**