

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

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

**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  |                    |   |                         |    |



# [CA-50978] Add Reissue Logic for FC, KG, AAP Issuances ( LA County)

|                                   |                        |                                  |                 |                               |                            |
|-----------------------------------|------------------------|----------------------------------|-----------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>          | Assignee:                        | <b>Eric Chu</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>553</b>                 |
| Reporter:                         | <b>Gloria Williams</b> | Regulation Reference:            |                 | Created:                      | <b>01/19/2018 11:42 AM</b> |
| Status:                           | <b>In Development</b>  | Impact Analysis:                 | <b>[N/A]</b>    | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Gloria Williams</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>[Fiscal]</b>        | Approved by Committee:           |                 | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                        | Consortium Review Approval Date: |                 |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

Currently, when an EDBC issuance is canceled with reason of 'Post Office Return', the system will suspend the vendor and hold all future issuances. Once the vendor's address is updated and vendor is unsuspending, all held issuances and reissue warrants that were canceled with reason of "Post Office Return" will be released. The reissue logic only works for EDBC related issuances and not Incidental Payments/Service Arrangements.

#### Request:

Follow the same re-issuance logic used for EDBC related issuances for Payment Requests and Incidental Payments:

When a cancellation transaction is received in the post back file for a service arrangement payment, CalSAWS needs to reissue payment based on the same logic as EDBC payments.

If an issuance's cancellation reason is for Post Office Return, then CalSAWS should suspend the vendor and set the payment in reissue status so once the suspension is lifted the payment will go out.

#### Recommendation:

1. Create new Reissuance Batch Sweep Job for LA County.
2. Modify the issuance batch job to include new logic to reissue cancellations with the reason of Post Office Return.
3. Modify and remove the logic for issuances with the cancellation reason of "Post Office Return" in the Foster Care EDBC Sweep.
  - a. Note: The new reissuance process being implemented in this SCR will take care of canceled EDBC and Payment Request/Incidental Payments.

### Outreach

#### Description:

#### Migration Impact

#### Description:

This functionality applies only to L.A. County and does not impact the other counties.

#### Migration Impact

#### Analysis:

#### Alternative

N/A

#### Procedure

#### Description:

#### Operational Impact:

#### Estimate:

**553**

|                  |     |                    |   |                         |   |
|------------------|-----|--------------------|---|-------------------------|---|
| Automated Test : | 0   | Batch/Interfaces : | 0 | Batch Operations :      | 0 |
| CalHEERS :       | 0   | CalHEERS Test :    | 0 | Client Correspondence : | 0 |
| DBA :            | 0   | Design :           | 0 | Eligibility :           | 0 |
| Fiscal :         | 359 | Forms Test :       | 0 | Imaging :               | 0 |
| IVR/CC :         | 0   | Online :           | 0 | Performance :           | 0 |

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|                       |   |                   |   |                       |     |
|-----------------------|---|-------------------|---|-----------------------|-----|
| Release Communication | 0 | Reports :         | 0 | Reports Test :        | 0   |
| Support :             |   | Special Project : | 0 | System Test Support : | 144 |
| Security :            | 0 | Tech Ops :        | 0 | Training :            | 0   |
| Tech Arch :           | 0 |                   |   |                       |     |
| Translation :         | 0 |                   |   |                       |     |



# [CA-211821] Diaper Allowance Skip Issuance

|                                   |                           |                                  |                   |                               |                            |
|-----------------------------------|---------------------------|----------------------------------|-------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>             | Assignee:                        | <b>Unassigned</b> | SPG Status:                   | <b>Approved</b>            |
| Fix Version/s:                    | <b>[21.07]</b>            | Designer Contact:                | <b>Jimmy Tu</b>   | Change Type (SCR):            | <b>New Policy</b>          |
| Minor Version:                    |                           | Expedite Changes:                | <b>No</b>         | Estimate:                     | <b>88</b>                  |
| Reporter:                         | <b>Sheryl E. Eppler</b>   | Regulation Reference:            | <b>ACL 18-38</b>  | Created:                      | <b>11/12/2019 04:06 PM</b> |
| Status:                           | <b>Design in Progress</b> | Impact Analysis:                 |                   | Outreach Required:            |                            |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</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>[Fiscal]</b>           | Approved by Committee:           |                   | Other Agency Cross Reference: | <b>CIV-103730</b>          |
| Consortium Review Approval:       |                           | Consortium Review Approval Date: |                   |                               |                            |

### Non-Committee

#### Review:

#### Expedite Approval:

#### Current Design:

With the implementation of SCR CA-59192 CIV-100305 (Add Additional Diaper Benefit Functionality Phase II), the functionality was developed to automatically create and pay diaper allowance to eligible participants. The automation is performed by different batch processes. The daily and monthly auxiliary payment authorization creation batch jobs are responsible for creating the need, service arrangement and payment request for the diaper allowance. The Payment Request Sweep will find payment requests created for diaper allowance that are in approved status and the WtW program or CW REP the payment request is associated to has a program status of Active, Pending, Non-compliant, Good Cause, Exempt or Sanction. These payment requests will, then, be processed by the Issuance Batch to create the issuances.

#### Request:

(1) When the WtW program is set into 'Exempt' Status after 10-day notice, the Payment Request Issuance Sweep is not picking up the Payment Request for Diaper Benefits.

#### Recommendation:

The Issuance batch will need to be updated to:  
 (1) pick up Payment Requests to be issued for WtW programs in Exempt Status after 10-day.

### Outreach

#### Description:

#### Migration Impact

Implement in both systems at same time

#### Description:

#### Migration Impact

#### Analysis:

#### Alternative

#### Procedure

#### Description:

#### Operational Impact:

Estimate: **88**

|                                 |    |                    |   |                         |    |
|---------------------------------|----|--------------------|---|-------------------------|----|
| Automated Test :                | 0  | Batch/Interfaces : | 0 | Batch Operations :      | 0  |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0 | Client Correspondence : | 0  |
| 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 :   | 23 |
| Tech Arch :                     | 0  | Tech Ops :         | 0 | Training :              | 0  |
| Translation :                   | 0  |                    |   |                         |    |



# [CA-219596] Add validation to Transaction Detail page Effective Month field

|                                   |                         |                                  |                     |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|---------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>           | Assignee:                        | <b>Sidhant Garg</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>72</b>                  |
| Reporter:                         | <b>Sheryl E. Eppler</b> | Regulation Reference:            |                     | Created:                      | <b>09/10/2020 06:45 AM</b> |
| Status:                           | <b>Pending Approval</b> | Impact Analysis:                 | <b>[N/A]</b>        | Outreach Required:            | <b>No</b>                  |
| Policy/Design Consortium Contact: | <b>Sheryl E. Eppler</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>[Fiscal]</b>         | Approved by Committee:           |                     | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       |                         | Consortium Review Approval Date: |                     |                               |                            |

### Non-Committee

**Review:**  
**Expedite Approval:**  
**Current Design:** Recovery Account Transaction Detail page field 'Effective Month' does not have any validation to ensure the date entered is not several months (or years) in the future.

**Request:** Prevent users from entering an Effective Date that is greater than one month in the future.

**Recommendation:**

1. On the Recovery Account Transaction Detail page, add a validation message that will prevent users from entering an Effective Date that is more than one month in the future.
2. Data Change any existing Transaction Detail records where the Effective Date is greater than the month after this SCR is implemented, to be the month after this SCR is implemented.

### Outreach

**Description:**  
**Migration Impact Description:** C-IV feedback has been addressed and the design has been approved through the Fiscal 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:** 72

|                                 |    |                    |   |                         |    |
|---------------------------------|----|--------------------|---|-------------------------|----|
| Automated Test :                | 0  | Batch/Interfaces : | 0 | Batch Operations :      | 0  |
| CalHEERS :                      | 0  | CalHEERS Test :    | 0 | Client Correspondence : | 0  |
| DBA :                           | 0  | Design :           | 0 | Eligibility :           | 0  |
| Fiscal :                        | 48 | 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 :   | 19 |
| Tech Arch :                     | 0  | Tech Ops :         | 0 | Training :              | 0  |
| Translation :                   | 0  |                    |   |                         |    |

 **[CA-224407] Add option of 'No' to the Fiscal County Authorizations**

|                                   |                         |                                  |                    |                               |                            |
|-----------------------------------|-------------------------|----------------------------------|--------------------|-------------------------------|----------------------------|
| Team Responsible:                 | <b>Fiscal</b>           | Assignee:                        | <b>John Besa</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>Start Build</b> | Estimate:                     | <b>814</b>                 |
| Reporter:                         | <b>Sheryl E. Eppler</b> | Regulation Reference:            |                    | Created:                      | <b>01/28/2021 02:09 PM</b> |
| Status:                           | <b>In Development</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>Migration</b>        | Migration Impact:                | <b>No</b>          | Funding Source ID:            |                            |
| Committee:                        | <b>[Fiscal]</b>         | Approved by Committee:           |                    | Other Agency Cross Reference: |                            |
| Consortium Review Approval:       | <b>EpplerSE</b>         | Consortium Review Approval Date: | <b>03/08/2021</b>  |                               |                            |

**Non-Committee Review:** Karen Rapponotti & Sheryl Eppler - Approved - 03/01/2021

**Expedite Approval:** Karen Rapponotti - Approved - 03/01/2021

**Current Design:** In the CalSAWS system the County Authorizations page Fiscal Section allows the County to set the level of authorization required for specific requests (approving an EDBC, creating an External Recovery Account, reissuing an Issuance ... etc.) Requests can go through one of the following Authorization processes:  
 1. '1st Level Authorization' which would require worker and 1st Level authorization.  
 2. '2nd Level Authorization' which would require Worker, 1st Level authorization, and 2nd Level Authorization.

**Request:** SCR # CA-213493, did not include an option of 'No' in the drop-down list. Only '1st Level Authorization' and '2nd Level Authorization' were documented to be in the drop-down list for the Fiscal "County Authorizations". This SCR is to add the "No" option in the dropdown list for Fiscal Section on the County Authorizations Page.

**Recommendation:**  
 1. Add the 'No' option to the Fiscal Section of the County Authorizations Page.  
 2. Update logic to not have an authorization approval process if the required approval level on the County Authorizations page is set to "No."

**Outreach**

**Description:**

**Migration Impact Description:** Design has been approved through Non-Committee Review. C-IV counties to adopt functionality at migration.

**Migration Impact Analysis:**

**Alternative Procedure Description:** N/a

**Operational Impact:**

**Estimate:** **814**

|                                 |     |                    |   |                         |     |
|---------------------------------|-----|--------------------|---|-------------------------|-----|
| Automated Test :                | 0   | Batch/Interfaces : | 0 | Batch Operations :      | 0   |
| CalHEERS :                      | 0   | CalHEERS Test :    | 0 | Client Correspondence : | 0   |
| DBA :                           | 0   | Design :           | 0 | Eligibility :           | 0   |
| Fiscal :                        | 528 | 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 :   | 211 |
| Tech Arch :                     | 0   | Tech Ops :         | 0 | Training :              | 0   |
| Translation :                   | 0   |                    |   |                         |     |