



Design Document

CA-50988 CIV-102852 – MC 355



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1. OVERVIEW

This SCR outlines the changes necessary to automate the MC 355 form population and generation in the C-IV and LRS systems. The form population will be facilitated through the creation of a new MC 355 detail page, MC 355 Verification Detail page, and a batch job to populate the initial MC 355 in C-IV and LRS. A reminder notice will automatically be generated after the initial MC 355 is created. When the MC 355 is past due, the worker can discontinue the Medi-Cal program for the reason of "Failed to Complete Redetermination" and generate a new NOA for the failure due to missing or incomplete verifications from a MC 355. The new NOA fragment will be triggered off of the "Failed to Complete Redetermination" Negative Action, the "Verification Due Date" and verifications on the MC 355 page. The existing "Failed to Complete Redetermination" NOA will generate when this new NOA is not triggered. The system will also be updated to generate the latest MC 355 form per ACWDL 18-25.

1.1 Current Design

MC 355 – Medi-Cal Request for Information – is available in the system via the Template Repository. Workers manually generate the form for needed verifications. After the form is sent, the Customer has 30 days to return it. The Workers are required to send a second notice during the 30-day timeframe if the Customer has not returned the MC 355. The second notice must state which verifications are missing. Workers generate the reminder notice manually or in LRS with the PA 2418C. After 30 days, the Worker will discontinue the case if the requested verifications have not been returned.

1.2 Requests

The MC 355 process is a workload issue. Automating additional notices after the initial MC 355 is sent will reduce the workload.

1.3 Overview of Recommendations

A new page flow will be created which will allow a worker to manage which verifications are requested on the initial MC 355 and that information will be used to generate the initial MC 355 Form. Each of the requested verifications will have an independent status which will be managed by the worker.

Fifteen calendar days after the initial MC 355 Form is created, the system will generate the MC 355 Reminder Form using the verifications which are still in Pending status from the initial MC 355 Form.

The MC 355 Form will be updated to dynamically display the questions based on which verifications were selected on the new MC 355 pages. Verifications which are not included on the MC 355 Detail page will not display on the generated MC 355 Form.

The MC 355 Form will be updated to no longer be available in the Template Repository.

A new daily batch job will be created to clean up MC 355 records for programs that are denied or discontinued through EDBC during the day, but have an open MC 355 record.

A task will be created when the MC 355 cover sheet is scanned/imaged.

A MC 355 due task will be created on the night of the "Verification Due Date" on the MC 355 Detail page.

Existing IFDS Interface job (PI19C407) will be modified to not trigger MC 355 Form.

Existing NHR Interface job (PI19C506) will be modified to not trigger MC 355 Form.

Note: There are no impacts to any of the batch jobs other than the ones listed in this SCR.

1.4 Assumptions

1. Only one MC 355 Detail record will be in progress at a time. Page Validation (see Recommendation 2.1.6) will prevent the creation of a new MC 355 Detail record when one is already in progress. Workers will need to action/close an existing MC 355 Detail record in order to create a new MC 355 Detail record.
2. The worker is responsible for discontinuing the Medi-Cal program for the reason of "Failed to Complete Redetermination" when an MC 355 is past due, and verifications haven't been turned in.
3. The automation to generate the reminder notice will only apply to forms generated from the MC 355 Detail page and will not apply to forms generated prior to the implementation of the SCR.
4. The MC 355 form will only be generated from the new MC 355 Detail Page and will not be available in the template repository.
5. No automation to send the RFTHI form with the MC 355 form will be added with this SCR. This form can be sent out in the same envelope as the MC 355 form if generated the same day by the worker.
6. Verifications updated through MC 355 Verification Detail page do not tie back to the verifications on the Verifications list page and user will be responsible for maintaining both sets of verifications.
7. Failure to Provide NOAs/Fragment reasons will continue to generate based off of existing logic. These messages will not be suppressed.
8. Reprint Centrally is automatically available when navigating to Document Detail for all forms. This will not be updated with this SCR.
9. The MC 355 Form, MC 355 Reminder Form, and new MC 355 Verifications NOA reason does not apply for CMSP.
10. The MC 355 Form will not be tracked via Customer Reporting.
11. The worker is responsible for any MC 355 Form Central Print requests that need to be canceled from the Distributed Documents page if the program is Discontinued the same day.
12. SB 87 page (that is currently not viewable in production because no one has the security rights for it) will not be updated with this SCR.
13. The batch job that auto rescinds Medi-Cal programs will pick up a case that was discontinued when verifications requested with MC 355 are not received and the

worker discontinued the program with the reason of "Failed to Complete Redetermination" if the rest of the criteria for the job is met.

14. It is the worker's responsibility to update the status on the MC 355 List Page. This includes when all verification(s) has been updated to a non-pending status. SCRs CIV-104389 CA-209049 will add automation around the status updates for MC 355 page.
15. LRS Only – Spanish version of MC 355 Initial Notice, Reminder Notices and MC 355 Verifications NOA will be turned off with this SCR. Spanish version will be turned on with the priority SCR CA-209115.

2 RECOMMENDATIONS

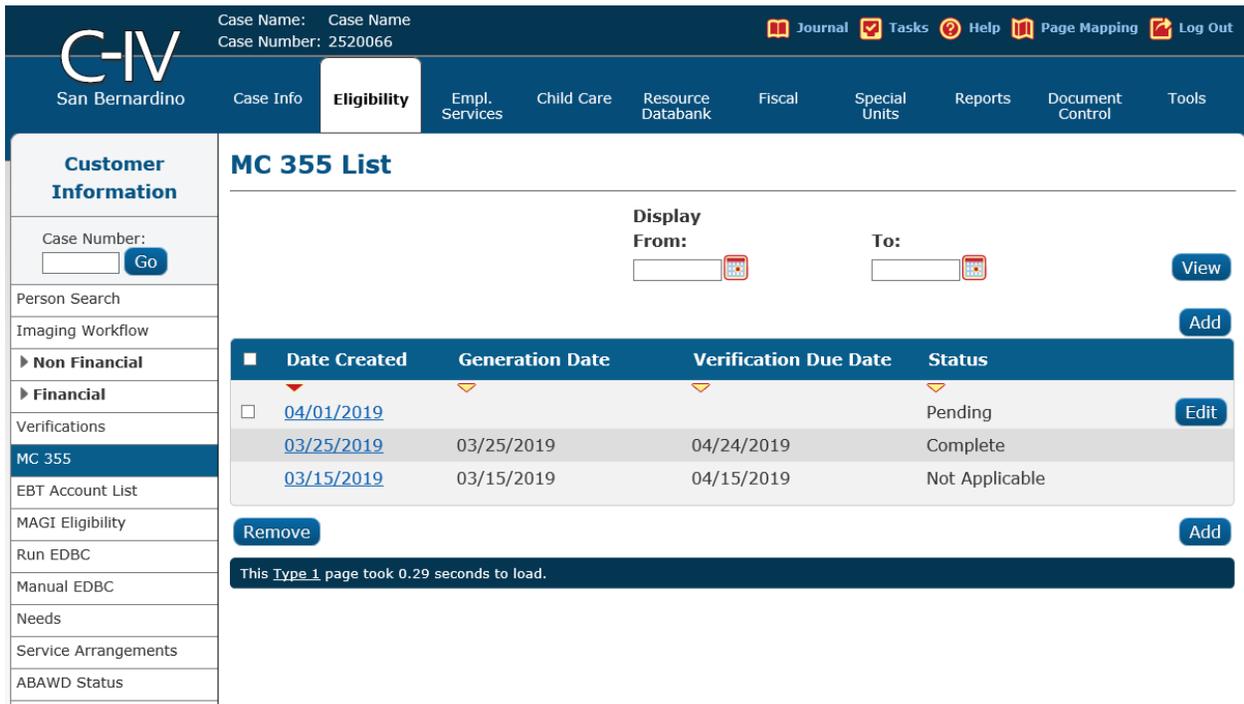
2.1 MC 355 List

2.1.1 Overview

Add the MC 355 List page to the C-IV and LRS Systems. The MC 355 List page displays a list of records that have been created through the MC 355 Detail page and provides access to that page.

The MC 355 List page is accessed via the new MC 355 link in the Customer Information task navigation. The MC 355 task navigation link will require the 'VerificationListView' security right to be visible.

2.1.2 MC 355 List Mockup



Case Name: Case Name
Case Number: 2520066

Journal Tasks Help Page Mapping Log Out

San Bernardino Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Document Control Tools

Customer Information

Case Number: Go

Person Search

Imaging Workflow

► Non Financial

► Financial

Verifications

MC 355

EBT Account List

MAGI Eligibility

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD Status

MC 355 List

Display From: To: View

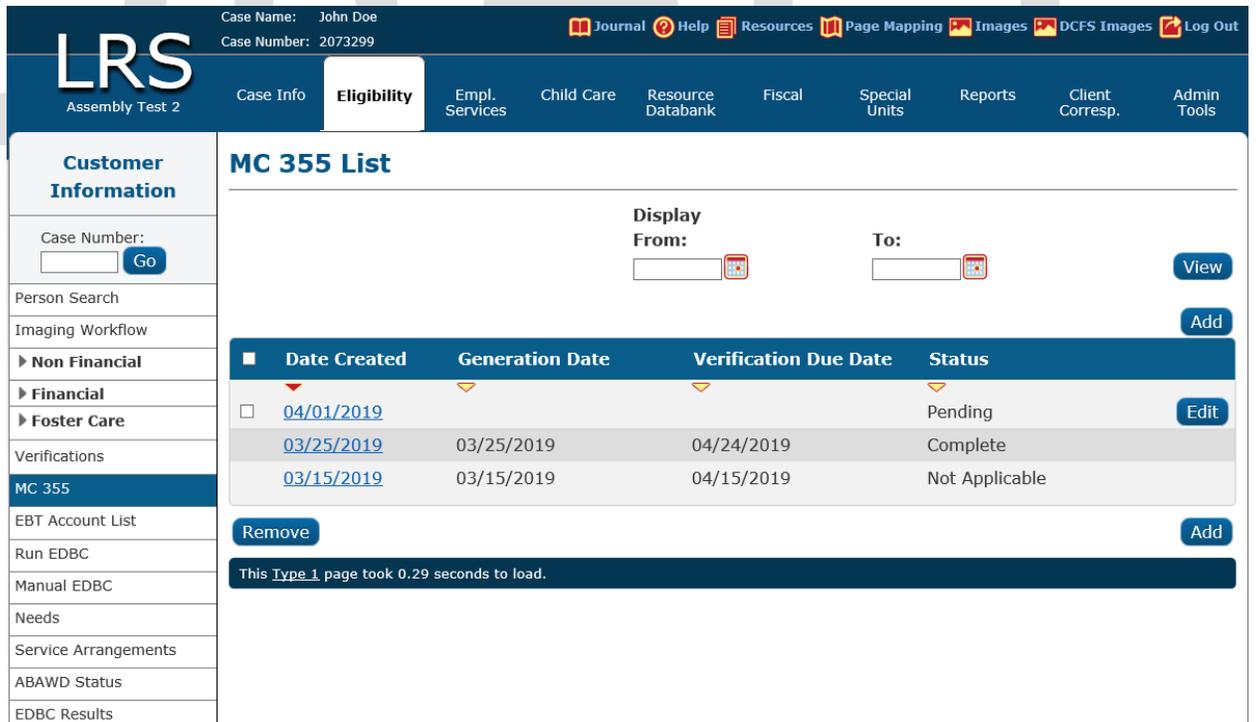
Add

<input type="checkbox"/>	Date Created	Generation Date	Verification Due Date	Status	Edit
<input type="checkbox"/>	04/01/2019			Pending	Edit
	03/25/2019	03/25/2019	04/24/2019	Complete	
	03/15/2019	03/15/2019	04/15/2019	Not Applicable	

Remove Add

This Type_1 page took 0.29 seconds to load.

Figure 2.1.1 – MC 355 List page (C-IV)



Case Name: John Doe
Case Number: 2073299

Journal Help Resources Page Mapping Images DCFS Images Log Out

Assembly Test 2 Case Info **Eligibility** Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Customer Information

Case Number: Go

Person Search

Imaging Workflow

► Non Financial

► Financial

► Foster Care

Verifications

MC 355

EBT Account List

Run EDBC

Manual EDBC

Needs

Service Arrangements

ABAWD Status

EDBC Results

MC 355 List

Display From: To: View

Add

<input type="checkbox"/>	Date Created	Generation Date	Verification Due Date	Status	Edit
<input type="checkbox"/>	04/01/2019			Pending	Edit
	03/25/2019	03/25/2019	04/24/2019	Complete	
	03/15/2019	03/15/2019	04/15/2019	Not Applicable	

Remove Add

This Type_1 page took 0.29 seconds to load.

Figure 2.1.2 – MC 355 List page (LRS)

2.1.3 Description of Changes

Upon first entering the MC 355 List page, records will be sorted by latest Date Created.

The MC 355 List page is comprised of the following fields:

- **Display From:** The beginning date from which to filter the search results by Date Created. This field is optional and has no default value.
- **To:** The ending date used to filter the search results by Date Created. This field is optional and has no default value.
- **View Button:** Clicking the View button will filter the below results to the date range entered in the Display From and To fields
- **Add Button:** This button navigates to the MC 355 Detail page in Create mode. The security right of 'VerificationListEdit' is required to view this button.
- **Checkbox:** Checkbox will be displayed for records that are in a pending status.

This requires the 'VerificationListEdit' security right to be viewed.

- **Date Created:** The date the MC 355 record was created. The hyperlink will navigate the user to the MC 355 Detail page in view mode. This hyperlink will require the 'VerificationListView' security right to be viewed, otherwise this will be displayed as plain text.
- **Generation Date:** The date the MC 355 was generated.
- **Verification Due Date:** The Due Date of the MC 355 verification(s).
- **Status:** The Status of the MC 355.
- **Edit Button:** Clicking the Edit button navigates to the MC 355 Detail page in Edit mode. The security right of 'VerificationListEdit' is required to view this button.

The Edit button does not display for MC 355 records that have the status Error, Completed or Not Applicable.

- **Remove Button:** Clicking the Remove button will delete records that have been chosen with the corresponding Checkbox. This button is displayed with the security right of 'VerificationListEdit' and when a MC 355 List record exists with a Pending status. When a record is removed, create a Journal Entry in the following format:
 - **Category** - All
 - **Type** – Data Removed
 - **Short Description** – MC 355 record has been removed
 - **Long Description** – MC 355 record with a Date Created {mm/dd/yyyy} was removed on {mm/dd/yyyy} by {Worker name} – {StaffId}.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: MC 355

2.1.5 Security Updates

Update the 'VerificationListView' and 'VerificationListEdit' security rights for access and use on the MC 355 List page.

2.1.6 Page Mapping

Add page mapping for the MC 355 List page.

2.1.7 Page Validation

Add a page validation to display when the View button is clicked with the To field populated by a date prior to or same as the date in the Display From field.

- To – To date must be after From date.

Add a page validation to display when the Add button is clicked and there exists at least one MC 355 that has a status other than Not Applicable, Completed, or Error.

- Add – A new MC 355 cannot be generated until all existing notices have the status of Complete, Not Applicable, or Error.

2.2 MC 355 Detail

2.2.1 Overview

Add the MC 355 Detail page to the C-IV and LRS Systems. The MC 355 Detail page captures, displays, and manages the fields that comprise the MC 355.

2.2.2 MC 355 Detail Mockup

MC 355 Detail

*- Indicates required fields

Save

Cancel

Date Created:	Status: *		
	Pending		
Generation Date:	Reminder Date:	End Date:	Verification Due Date:
			<input type="text"/> 

Requested Verifications - First Notice *

Type	Sub-Type	Person	Status

Add

▶ Reminder Notice(s)

Status History

Status	Action Date	Updated by
Pending		217659

Save

Cancel

This Type_1 page took 0.34 seconds to load.

Figure 2.2.1 – MC 355 Detail (Create Mode)

MC 355 Detail

*- Indicates required fields

Save

Cancel

Date Created: **Status: ***
Pending

Generation Date: **Reminder Date:** **End Date:** **Verification Due Date:**



Requested Verifications - First Notice *

Type	Sub-Type	Person	Status	
<input type="checkbox"/> Income	Earned Income	Jane Doe	Pending	Edit

[Remove](#)

[Add](#)

▶ Reminder Notice(s)

Status History

Status	Action Date	Updated by
Pending		217659

Save

Cancel

This [Type 1](#) page took 0.34 seconds to load.

Figure 2.2.2 – MC 355 Detail (Create Mode with added Verification)

MC 355 Detail

*- Indicates required fields

Generate MC 355

Edit

Close

Date Created:

03/01/2019

Status: *

Pending

Generation Date:

Reminder Date:

End Date:

Verification Due Date:

Requested Verifications - First Notice *

Type	Sub-Type	Person	Status	
Income	Veteran's Benefits	John Doe	Pending	Verify
Income Deductions	Child Care	Jane Doe	Pending	Verify
Other	Other	Johnny Doe Jr	Pending	Verify
Residence	Current Utility Bill	Jane Doe	Pending	Verify

▶ Reminder Notice(s)

Status History

Status	Action Date	Updated by
Pending	03/01/2019 03:02:34 PM	217659

Generate MC 355

Edit

Close

This Type_1 page took 0.17 seconds to load.

Figure 2.2.3 – MC 355 Detail (View Mode)

MC 355 Detail

*- Indicates required fields

Save Cancel

Date Created: 03/01/2019	Status: * Pending	Generation Date:	Reminder Date:	End Date:	Verification Due Date: <input type="text"/>
------------------------------------	-----------------------------	-------------------------	-----------------------	------------------	---

Requested Verifications - First Notice *

Type	Sub-Type	Person	Status	
<input type="checkbox"/> Income	Veteran's Benefits	John Doe	Pending	Edit
<input type="checkbox"/> Income Deductions	Child Care	Jane Doe	Pending	Edit
<input type="checkbox"/> Other	Other	Johnny Doe Jr	Pending	Edit
<input type="checkbox"/> Residence	Current Utility Bill	Jane Doe	Pending	Edit

Remove [Add](#)

▶ Reminder Notice(s)

Status History

Status	Action Date	Updated by
Pending	02/28/2019 03:02:34 PM	217659

Save Cancel

This [Type 1](#) page took 0.34 seconds to load.

Figure 2.2.4 – MC 355 Detail (Edit Mode with Pending Status)

MC 355 Detail

*- Indicates required fields

Save

Cancel

Date Created: 03/01/2019	Status:* Sent		
Generation Date: 03/01/2019	Reminder Date: 03/11/2019	End Date:	Verification Due Date: 04/01/2019

Requested Verifications - First Notice *

Type	Sub-Type	Person	Status	
Income	Veteran's Benefits	John Doe	Pending	Edit
Income Deductions	Child Care	Jane Doe	Pending	Edit
Other	Other	Johnny Doe Jr	Pending	Edit
Residence	Current Utility Bill	Jane Doe	Pending	Edit

Reminder Notice(s)

Reminder Date	Status
03/11/2019	Sent

Generate Reminder

Status History

Status	Action Date	Updated by
Sent	03/01/2019 01:48:35 AM	186476
Pending	02/28/2019 03:02:34 PM	217659

Save

Cancel

This [Type 1](#) page took 0.62 seconds to load.

Figure 2.2.5 – MC 355 Detail (Edit Mode with Sent Status)

MC 355 Detail

*- Indicates required fields

Save Cancel

Date Created: 03/01/2019
Status: * Sent

Generation Date: [03/01/2019](#)
Reminder Date: 03/11/2019
End Date:
Verification Due Date: 04/01/2019

Requested Verifications - First Notice *

Type	Sub-Type	Person	Status	
Income	Veteran's Benefits	John Doe	Pending	Edit
Income Deductions	Child Care	Jane Doe	Pending	Edit
Other	Other	Johnny Doe Jr	Pending	Edit
Residence	Current Utility Bill	Jane Doe	Pending	Edit

Reminder Notice(s)

Reminder Date	Status
<input type="checkbox"/>	Pending
03/11/2019	Sent

Remove

Status History

Status	Action Date	Updated by
Sent	03/01/2019 01:48:35 AM	186476
Pending	02/28/2019 03:02:34 PM	217659

Save Cancel

This [Type 1](#) page took 0.62 seconds to load.

Figure 2.2.6 – MC 355 Detail (Edit Mode with Sent Status and a Reminder Notice)

2.2.3 Description of Changes

The page is comprised of the following fields:

- **Generate MC 355 Button:** Clicking the Generate MC 355 button will open a new window with the MC 355 Form.

The Generate MC 355 button displays in View mode and the MC 355 Detail has no Generation Date and a Medi-Cal program exists on the case.

Note: The MC 355 Form will be generated and saved to the case after the 'Save and Print Locally' button has been selected. When the Form has been generated and saved to the case the MC 355 Detail Status will be updated to "Sent".

- **Edit Button:** Clicking the Edit button reloads the page in Edit mode. The security right of 'VerificationListEdit' is required to view this button.

The Edit button does not display for MC 355 records that have the status Error, Completed or Not Applicable.

- **Close Button:** Clicking the Close button navigates to the MC 355 List page, where the previous search results will display.

The Close button displays in View mode.

- **Save Button:** Clicking the Save button saves any changes made to the MC 355 and reloads the page in View mode. In Create mode, this will commit Requested Verification records to the database.

The Save button displays in Create or Edit modes.

- **Cancel Button:** Clicking the Cancel button discards any changes made to the MC 355 record and navigates to the MC 355 List page, where the previous search results will display.

The Cancel button displays in Create or Edit modes.

- **Date Created:** The date the MC 355 record was created. This value will be set by the system when the record is saved initially.

- **Status:** The status of the MC 355 Detail Page. The possible values of this field are:
 - Pending
 - Sent
 - Complete
 - Incomplete
 - Not Applicable
 - Error

The status will be updated from Pending to Sent when the MC 355 is generated and sent.

In Edit mode, the user can select from a dropdown the following status of Complete, Incomplete, or Not Applicable if the status is currently Sent or Incomplete. Also, in Edit mode, this field is view only if status is currently Pending, Not Applicable, Complete or Error.

- **Generation Date:** The date the MC 355 form was generated. The System populates this field. Clicking the hyperlink opens the generated MC 355 form from the Distributed Documents in a new browser tab.
- **Reminder Date:** The date the most recent Reminder Notice was generated.
- **End Date:** The date the Status field of the MC 355 was saved and updated to Complete, Not Applicable, or Error. The System populates this value during page save logic.
- **Verification Due Date:** The date by which all the Requested Verifications are due. This field will only be editable when the status is Sent or Incomplete or Pending.

In Create mode, the Verification Due Date will be blank. The System will set the Verification Due Date to the first business day at least 30 calendar days after the notice is generated. If the 30th calendar date is a Sunday or a Holiday, the due date will be the following business day.

- **Requested Verifications:** This section displays the verifications that are requested by the MC 355. These records will be sorted by Type in alphabetical order.

Note: Requested Verification records that are saved with hidden/duplicate persons will be displayed with the associated case person.

Checkbox: Checkbox will be displayed in Create mode, as well as Edit mode when the MC 355 Status field has the value of Pending.

The Checkbox requires the 'VerificationDetailEdit' security right to be viewable.

Type: The type of verification requested.

The field contains a hyperlink to corresponding MC 355 Verification Detail record.

The 'VerificationDetailView' security right will be required to view the hyperlink to the associated MC 355 Verification Detail, otherwise this will be displayed as plain text.

- **Sub-Type:** The specific verification requested in the Type. This field will be hyperlinked if Data Collection List page is available. Only available after MC 355 record has been created.

This will be protected by security rights associated with the Sub-Type value, See **Appendix 7.1** for values of this field and associated security rights. When the user has the associated security right and the Sub-Type has an associated Hyperlink Navigation, the hyperlink will be available. Otherwise this will be displayed as plain text.

See **Appendix 7.1** for a listing of hyperlink navigation information for each value of this field.

- **Person:** The case person in need of the verification.
- **Status:** The status of the requested verification.

The possible values of this field are:

- Pending
- Verified
- Refused
- Not Applicable

- **Verify Button:** Clicking the Verify button will update the status of the verification to Verified. This action will be committed to the database without entering Edit mode.

The Verify button will require the 'VerificationDetailEdit' security right to be viewable and displays in View mode and if the record is not verified. The Verify button does not display for MC 355 records that have the status Error, Complete or Not Applicable.

- **Edit Button:** Clicking the Edit button will navigate to the associated MC 355 Verification Detail record.

The Edit button will require the 'VerificationDetailEdit' security right to be viewable and displays in Create or Edit modes. The Edit button does not display for MC 355 records that have the status Error, Completed or Not Applicable.

- **Remove Button:** Clicking the Remove button will delete the above rows with checked checkboxes.

The Remove button requires the 'VerificationDetailEdit' security right to be viewable and displays in Create mode, as well as Edit mode when the MC 355 Status field has the value Pending and at least one verification exists.

Note: Clicking the Remove button without checkboxes selected will not produce any change to the record.

- **Add Button:** Clicking the Add button will navigate to MC 355 Verification Detail page.

The Add button requires the 'VerificationDetailEdit' security right to be viewable and displays in Create mode, as well as Edit mode when the Status field has the value Pending.

- **Reminder Notice(s):** The Reminder Notices section is collapsed by default and contains the text "No Data Found" if no Reminder Notices exist for the given MC 355. When data exists, this section will be expanded. Rows in this section are sorted with the most recent Reminder Date at the top. A Pending reminder notice will always be the first row of the table, if one exists.

- **Checkbox:** Checkbox will be displayed for records that are in a Pending status.

This will require the 'VerificationListEdit' security right to be viewable and will only display in Edit mode.

- **Reminder Date:** The date the Reminder Notice was printed. Clicking the hyperlink opens the generated Reminder Notice form in a new tab.
- **Status:**

The possible values of this field are:

- Pending
- Sent
- Error

The status of the Reminder Notice. Reminder Notices created by the user have the initial status Pending. The System updates this to Sent or Error Status when the notice is generated via the Reminder MC 355 Sweep.

- **Remove Button:** Clicking the Remove Button will remove the checked records and will be set accordingly when the record is saved.

The Remove Button only displays in Edit mode for Reminder Notices with the status Pending.

- **Generate Reminder Button:** Clicking the Generate Reminder button creates a new Reminder Notice record with a Pending status, which will display in the Reminder Notice(s) section.

This button will only display in Edit mode and when a Reminder Notice is not in Pending status.

Note: Clicking the Generate Reminder button will not generate the MC 355 Reminder Form. Pending Reminder Notice records will be picked up by the Reminder MC 355 Sweep and the Form will be generated at that time.

- **Status History:** This section displays the historical record of each time the MC 355's status changed, when that change took place, and the staff or batch process that made the change. The rows in this table are sorted by Action Date in descending order.
 - **Status:** The status of the MC 355 Detail record.

- In Create mode, Status will be prepopulated with Pending.
- **Action Date:** The timestamp of when the status change was applied to the MC 355.
 - **Updated By:** The staff ID of the Worker or batch process that changed the status. Clicking the hyperlink navigates to the Worker Detail page for that staff member.

In Create mode, Updated By will be prepopulated with Staff ID.

2.2.4 Page Location

Global: Eligibility

Local: Customer Information

Task: MC 355

2.2.5 Security Updates

Update the 'VerificationListEdit', 'VerificationDetailView', and 'VerificationDetailEdit' security rights for access and use on the MC 355 Detail page.

2.2.6 Page Mapping

Add page mapping for the MC 355 Detail page.

2.2.7 Page Validation

Add page validation to display when the user clicks the Generate Reminder button when none of the Requested Verifications has the status of Pending.

- Generate Reminder – A Reminder Notice can only be generated if at least one Requested Verification has the status Pending.

Add page validation to display when the user clicks the Generate Reminder button while the MC 355 has the status Pending:

- Generate Reminder – A Reminder Notice cannot be generated for a Pending MC 355.

Add page validation to display if the user attempts to save the MC 355 from Create or Edit mode with a Verification Due Date that is in before current date.

- Verification Due Date – Verification Due Date cannot be prior to system date.

Note: This validation will not be triggered if no change was made to Verification Due Date.

Add page validation to display if the user attempts to save the MC 355 with a Verification Due Date that is before or same as the Generation Date.

- Verification Due Date – Verification Due Date must be after Generation Date.

Add page validation to display if the user attempts to save the MC 355 with no Verification Due Date when the MC 355 status is Sent or Incomplete.

- Verification Due Date – Verification Due Date is required when MC 355 is Sent or Incomplete.

Add page validation to display if the user attempts to save the MC 355 with no Verifications.

- Add – Requested Verification is required for an MC 355.

2.3 MC 355 Verification Detail

2.3.1 Overview

Add the MC 355 Verification Detail page to the C-IV and LRS Systems. The MC 355 Verification Detail page will be used to manage information on a verification record.

2.3.2 MC 355 Verification Detail

MC 355 Verification Detail

*- Indicates required fields

[Edit](#) [Close](#)

Type: * Income	Sub-Type: * Earned Income
Person: * Jane Doe	Status: * Pending
Customer Notice: Current Earned Income Verifications.	

[Edit](#) [Close](#)

This Type 1 page took 0.46 seconds to load.

Figure 2.3.1 –MC 355 Verification Detail (View Mode)

MC 355 Verification Detail

*- Indicates required fields

Save and Return

Cancel

Type: * Income	Sub-Type: * Earned Income
Person: * Jane Doe	Status: * Pending
Customer Notice: Current Earned Income Verifications.	
Maximum characters allowed is 150. Current character count is: 36	

Save and Return

Cancel

This Type_1 page took 0.70 seconds to load.

Figure 2.3.2 –MC 355 Verification Detail (Create Mode)

MC 355 Verification Detail

*- Indicates required fields

Save and Return

Cancel

Type: * Income	Sub-Type: * Earned Income
Person: * Jane Doe	Status: * Pending
Customer Notice: Current Earned Income Verifications.	
Maximum characters allowed is 150. Current character count is: 36	

Save and Return

Cancel

This Type_1 page took 0.68 seconds to load.

Figure 2.3.3 –MC 355 Verification Detail (Edit Mode with Linked MC 355 in Pending Status)

MC 355 Verification Detail

*- Indicates required fields

Save and Return

Cancel

Type: *
Income

Sub-Type: *
Earned Income

Person: *
Jane Doe

Status: *
Pending

Customer Notice:
Current Earned Income Verifications.

Save and Return

Cancel

This Type 1 page took 0.69 seconds to load.

Figure 2.3.3 –MC 355 Verification Detail (Edit Mode with Linked MC 355 in Sent Status)

2.3.3 Description of Changes

The MC 355 Verification Detail page is comprised of the following fields:

- **Edit Button:** Clicking the Edit button reloads the page in Edit mode. This button requires the 'VerificationDetailEdit' security right to be viewed.

The Edit button does not display for MC 355 records that have the status Error, Completed or Not Applicable.

- **Save and Return Button:** Clicking this button saves any changes made to the MC 355 Verification Detail and navigates the user back to MC 355 Detail page in previous page mode.

In Create Mode of the MC 355 Detail page, this button will not commit the Requested Verification record to the database until the MC 355 Detail record has been saved. In Edit Mode of the MC 355 Detail page, this button will commit the MC 355 Verification Detail record to the database.

This button displays in Create or Edit modes.

- **Cancel Button:** Clicking the Cancel button discards any changes made to the MC 355 Verification Detail record and navigates the user back to MC 355 Detail page in previous page mode.

This button displays in Create or Edit modes.

- **Close Button:** Clicking the Close button navigates the user back to MC 355 Detail page in previous page mode.

This button displays in View mode.

- **Type:** The type of verification requested. This field is only editable in Create and Edit mode and when the status of the MC 355 is Pending.

This is a required field.

See **Appendix 7.1** for the values of the Type Field. The values in the drop down will be in alphabetical order.

- **Sub-Type:** The specific verification requested in the Type. This field is only editable in Create and Edit mode and when the status of the MC 355 is Pending.

This is a required field.

The drop-down values in the Sub-Type field depends on the selected value in the Type field. See **Appendix 7.1** for a complete mapping of the Type and Sub-Type values. These values will be shown in the drop down in alphabetical order.

- **Person:** The case person in need of the verification. The dropdown will contain Case Person names in ascending order. The values will be in the following format, '{First Name} {Last Name}' (LRS Only - '{Last Name}, {First Name}{Age}{Gender Code}', Hidden/duplicate persons will not be displayed. In view mode or when the field is un-editable, the name will be in the following format '{First Name} {Last Name}'.

This field is editable in Create mode. This is a required field.

Note: After a MC 355 Verification Detail has been saved, the Person's name will be displayed when marked as a Hidden/duplicate person.

- **Status:** The status of the requested verification. The possible values of this field are:
 - Pending
 - Verified
 - Refused
 - Not Applicable

This field is editable in Create mode or Edit mode when the MC 355 status is Pending, Sent, or Incomplete. This is a required field. The values in the drop down will be in alphabetical order.

- **Customer Notice:** This field contains the user-entered description for the requested verification. This field is only editable in Create or Edit mode when the status of the MC 355 is Pending.
 - When editable, the label stating 'Maximum value allowed is 150. Current character count is: <number of characters entered>' will be displayed below the field, to keep count of current characters entered.

2.3.4 Page Location

Global: Eligibility

Local: Customer Information

Task: MC 355

2.3.5 Security Updates

Update the 'VerificationDetailEdit' security right for access and use on the MC 355 Verification Detail page.

2.3.6 Page Mapping

Add page mapping for MC 355 Verification Detail page.

2.3.7 Page Validation

Add page validation to display when the user enters a customer description that is greater than 150 characters:

- Customer Notice – Value is too long [Max. length: 150 Characters].

2.4 Position Detail – LRS Only

2.4.1 Overview

Update the Position Detail page in the LRS System to include the MC 355 task category.

Tasks		
<input type="checkbox"/> Application (All)	<input type="checkbox"/> Case Update	<input type="checkbox"/> DCFS RDB
<input type="checkbox"/> Application Registration	<input type="checkbox"/> EBT	<input type="checkbox"/> Fraud
<input type="checkbox"/> CMIPSII	<input type="checkbox"/> IEVS	<input type="checkbox"/> IEVS Criminal
<input type="checkbox"/> CalHEERS	<input type="checkbox"/> IEVS Priority	<input type="checkbox"/> MC 355
<input type="checkbox"/> YBN	<input type="checkbox"/> MEDS Alert	<input type="checkbox"/> MEDS Liaison
<input type="checkbox"/> e-ICT	<input type="checkbox"/> QR7LA	<input type="checkbox"/> Quality Assurance Assignment
	<input type="checkbox"/> Redetermination	<input type="checkbox"/> SAR7
	<input type="checkbox"/> YBN E-communications	

Figure 2.4.1 –Position Detail (LRS)

2.4.2 Description of Changes

Update the Tasks section to include the Task Type MC 355.

2.4.3 Page Location

Global: Admin Tools

Local: Office Admin

Task: N/A

2.4.4 Security Updates

No Updates.

2.5 Automated Task Creation

2.5.1 Overview

Create a new automated task to alert the Worker when verifications are submitted with an MC 355 cover sheet.

Create a new automated task to alert the Worker that an MC 355 verifications is overdue.

Note: C-IV automated tasks can be turned off by county depending on need.

2.5.2 MC 355 Verifications Received Automated Task

Create a new automated task that will be created when verifications are submitted with an MC 355 cover sheet.

Note: MC 355 Forms received through YBN, C4Yourself, or the Document Kiosk will create the existing images uploaded task.

MC 355 Verifications Received Details - LRS	
Trigger Condition	Verifications have been received and imaged with a MC 355 cover sheet.
Task Type	MC 355 Verifications Received
Task Category	MC 355
Task Priority	High

Task Due Date	5 days
Task Expiration Date	30 days
Task Long Description	Update the MC 355 Detail page with verifications received and corresponding Financial/Non-Financial pages.
Guided Navigation	Navigate to the open (record without an end date) MC 355 Detail page. Note: the link between the task and MC 355 record is established when the task is created. If a new MC 355 record is created, after the task has been created, the guided navigation link will bring the User to the originally linked MC 355 detail page.
Task Initial Assignment	Office Distribution

MC 355 Verifications Received Details - C-IV

Trigger Condition	Verifications have been received and imaged with a MC 355 cover sheet.
Automated Action Name	MC 355 Verifications Received
Automated Action Scenario	A MC 355 and verifications have been received through C-IV System, and ImageNow. Review the document for further action.
Automated Action Program	MC
Automated Action Source	Online
Automated Action Run Date	Real Time
Task Initial Assignment	Current Program Worker
Task Due Date	5 calendar days

Task Long Description	Update the MC 355 Detail page with verifications received, and corresponding Financial/Non-Financial pages.
Task Type	MC 355 Verifications Received
Task Sub-Type	
Task Priority	High
Task Period	30 days
Expiration Type	After Task is Created
Available for Automation	Yes
Task Available Online	No
Task Newly Assigned Indicator	5 days

For C-IV:

For multiple Medi-Cal programs, the associated Active programs on system date will be prioritized in sequential order starting from Medi-Cal #1 and a task will be created for the first program that is Active. If none are Active, then the task will be associated to Medi-Cal #1, and created in accordance with Task Type information defined by the county.

2.5.3 MC 355 Due Automated Task

Create a new automated task that will be created when an MC 355 verifications is past due.

Note: Task will be generated the next business day if it is a Sunday or county holiday.

MC 355 Due Details - LRS	
Trigger Condition	An MC 355 has the Sent or Incomplete status and "Verification Due Date" on the MC 355 detail page is in the past.
Task Type	MC 355 Due
Task Category	MC 355
Task Priority	High

Task Due Date	5 days
Task Expiration Date	30 Days
Task Long Description	MC 355 pending verifications are overdue. Review the MC 355 Detail page and take appropriate action.
Guided Navigation	MC 355 List page
Task Initial Assignment	Office Distribution

MC 355 Due Details - C-IV

Trigger Condition	An MC 355 has the Sent or Incomplete status and "Verification Due Date" on the MC 355 detail page is in the past.
Automated Action Name	MC 355 Due
Automated Action Scenario	An MC 355 has the Sent or Incomplete status and "Verification Due Date" on the MC 355 detail page is in the past.
Automated Action Program	MC
Automated Action Source	Batch
Automated Action Run Date	Daily (Mon-Sat)
Task Initial Assignment	Current Program Worker
Task Due Date	5 calendar days
Task Long Description	MC 355 pending verifications are overdue. Review the MC 355 Detail page and take appropriate action.

Task Type	MC 355 Due
Task Sub-Type	
Task Priority	High
Expiration Period	30 days
Expiration Type	After Task is Created
Available for Automation	Yes
Task Available Online	No
Task Newly Assigned Indicator	5 days

For C-IV:

For multiple Medi-Cal programs, the associated Active programs on system date will be prioritized in sequential order starting from Medi-Cal #1 and a task will be created for the first program that is Active. If none are Active, then the task will be associated to Medi-Cal #1, and created in accordance with Task Type information defined by the county.

2.5.4 Task Category Initialization DCR – LRS Only

This section introduces a new Task Category in LRS to distinguish which positions are capable of receiving MC 355 task assignments. As part of the implementation of this SCR, a DCR will be developed and executed. This DCR will enable positions that can receive “Redetermination” task category assignments, to receive “MC 355” task category assignments as well.

The positions to be enabled are evaluated by the DCR as of implementation date.

2.6 Initial MC 355 Sweep

2.6.1 Overview

A nightly batch will be created to check for cases which have at least one pending or active Medi-Cal program and a MC 355 Detail record in Pending status and the form was not Printed Centrally using **Generate MC 355 button**.

2.6.2 Description of Change

For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a MC 355 during forms processing.

Transaction values:

- Case ID: Case associated to MC 355 Detail record
- Program ID: Active/Pending Medi-Cal program ID
- Person ID: Primary Applicant of Active Medi-Cal program
- Type Code: FR
- Sub Type Code: TBD
- Eff Date: Due Date of MC 355 Detail record
- Created By: Batch
- Updated By: Batch

2.6.3 Execution Frequency

This Batch Job will run every business day (Monday – Saturday).

2.6.4 Key Scheduling Dependencies

This job will run after MC 355 Detail Record Cleanup

This job will run before forms balancers

2.6.5 Counties Impacted

This job will run for all counties.

2.6.6 Data Volume/Performance

N/A

2.6.7 Failure Procedure/Operational Instructions

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

2.7 Reminder MC 355 Sweep

2.7.1 Overview

A nightly batch will be created to check for cases which have at least one active or pending Medi-Cal program, a MC 355 Detail record in Sent or Incomplete status, a reminder notice has not been generated and the initial request (the MC 355 Form generation date) was created at least 15 days in the past or there is a pending reminder notice record on the MC 355 Detail page.

2.7.2 Description of Change

For each record returned in the driving query, a record will be inserted into the batch transaction table to generate a reminder MC 355 during forms processing.

This will also add a record to the MC 355 Detail Page to add a Pending entry to the Reminder Notice section if one does not already exist.

Transaction values:

- Case ID: Case associated to MC 355 Detail record
- Program ID: Active/Pending Medi-Cal program ID
-
- Person ID: Primary Applicant of Active Medi-Cal/MSP program
- Type Code: FR
- Sub Type Code: TBD
- Eff Date: Due Date of MC 355 Detail record
- Created By: Batch
- Updated By: Batch

2.7.3 Execution Frequency

This Batch Job will run every business day (Monday – Saturday).

2.7.4 Key Scheduling Dependencies

This job will run after MC 355 Detail Record Cleanup

This job will run before forms balancers

2.7.5 Counties Impacted

This batch job will run for all counties.

2.7.6 Data Volume/Performance

N/A

2.7.7 Failure Procedure/Operational Instructions

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

2.8 Update Form - MC 355 – Medi-Cal Request for Information

2.8.1 Overview

Currently the MC 355 (Medi-Cal Request for Information) gets manually generated by the worker from template repository when requesting verifications. This update will remove the form from template repository, update the form to the newest state version (07/2018 from ACWDL 18-25), and now automatically generate the MC 355 form from the MC 355 Detail page. The update will also add automation for generating a MC 355 Reminder form. Both the MC 355 Form and the MC 355 Reminder Form will be generated in English and Spanish (Threshold languages will be added in a future SCR).

See Supporting Documents #4 & 5 for MC 355 and MC 355 Reminder Form FDDs.

2.8.2 Description of Change

2.8.2.1 Update the MC 355 Form

The MC 355 form will be updated to the newest version provided with ACWDL 18-25. See Supporting Document #4 for newest version. It will also be updated with a Cover Sheet (the cover sheet will be system specific) that recipients can use to mail back the verification(s) requested in the MC 355 Form. Included with the MC 355 Form will be an envelope to mail back the Cover Sheet and requested verifications (C-IV: BRM envelope, LRS: Prepaid envelope).

Notes:

LRS and C-IV will maintain the current system specific header/cover sheet for the Form (see FDD for C-IV and LRS cover sheet). In C-IV, the MC 355 Form will also include the imaging barcode as is the current functionality. In LRS, a bar code will be added to MC 355 Form however, the Form itself is not expected to be sent back. The MC 355 will no longer be available in Template Repository. Workers must use the MC 355 Detail page to create a MC 355.

2.8.2.2 Add/Update Generation for MC 355 Form

2.8.2.2.1 Add new MC 355 Form Generation Logic

New logic will be added to generate the MC 355 Form from the MC 355 Detail page via the Generate MC 355 button (see Recommendation 2.2.3 for button location and online page) or during nightly batch there is a new instance of the MC 355 on the MC 355 Detail page and the worker has not sent one out via the Generate MC 355 button (see Recommendation 2.5 for Nightly Batch Sweep).

2.8.2.2.2 Remove Existing MC 355 Form Generation Logic

LRS only: Remove the existing logic that generates MC 355 Form. The NHR Interface will no longer generate the MC 355 Form.

Note: MC 355 Form does not have any automated generation in C-IV.

2.8.2.2.3 Add Journal Entry for MC 355 Form

Generate the MC 355 Form with a custom Journal Entry:

- Case ID: Case associated to MC 355 Detail record
- Type: 04
- Short Description: MC 355 Detail Processed
- Long Description: MC 355 sent. Verifications due by <Due Date (MM/DD/YYYY)>.
- Created By: This batch or user
- Updated By: This batch or user

Note: The new Journal Entry will be created for both worker created and batch generated MC 355 Forms.

2.8.2.2.4 Update MC 355 Detail Record status

Update the MC 355 Record status to Sent when the form is generated through the Generate MC 355 Button and the form has been printed Locally.

If the MC 355 Detail record verification due date has not been set when the form is generated the MC 355 Detail record will be populated with the verification due date by adding 30 days to the MC 355 generation date. If the 30th day falls on a Sunday or on a County holiday, move the due date to the next business day. Update MC 355 Detail page with the Verification Due Date.

Note: If the form is printed centrally, leave the MC 355 record in Pending status. Form generation thread job will pick up this record and update the status to Sent.

2.8.2.3 Add Generation for a MC 355 Reminder Form

2.8.2.3.1 Add new MC 355 Form Generation Logic

New logic will be added to generate the MC 355 Reminder Form from the MC 355 Detail page via the Generate Reminder Button (see

Recommendation 2.2.3 for button location and online page) or during nightly batch when there is at least one pending or active Medi-Cal program, a MC 355 Detail record in Sent or Incomplete status, a reminder notice has not been sent, and the initial request was created at least 15 calendar days in the past (see Recommendation 2.7 for Nightly Batch Sweep).

Note: The MC 355 Reminder Form will also have the Cover Sheet and Envelope that the original MC 355 Form generates with.

2.8.2.3.2 Add Journal Entry for MC 355 Reminder Form

Generate the MC 355 Reminder Form with a custom Journal Entry:

- Case ID: Case associated to MC 355 Detail record
- Type: 04
- Short Description: MC 355 Detail Processed
- Long Description: MC 355 Reminder sent. Verifications due by <Due Date (MM/DD/YYYY)>.
- Created By: This batch or user
- Updated By: This batch or user

Note: The new Journal Entry will be created for both worker created and batch generated MC 355 Forms.

2.8.2.4 Add Population for MC 355 and MC 355 Reminder Forms

New logic will be added to populate the MC 355 form based on the information on the new MC 355 Detail page. See table below for new Variable population:

Variable	Description	Population
Due Date	The date the verification needs to be returned by.	Will populate with the Due Date from the MC 355 Detail page if entered by user. If the Due date was not entered by the user, populate the verification due date by adding 30 calendar days to the MC 355 generation date. If the 30th day falls on a Sunday or on a County holiday, move the due date to the next business day.

Verification Check Box	A check box that indicates if this is a verification being requested.	These boxes will be checked when generated from a MC 355 Detail record.
Verification Person	The name of the Person requiring the verification.	Will be populated with the person's name from the MC 355 Detail verification record.
Customer Notice	Description of requested verification.	Will be populated with the Customer Notice Section of the verification requested when generated from a MC 355 Detail record. This field will hold up to 150 characters.

Note: A table displaying the person (Verification Person variable) and description of the verifications entered on the MC 355 Detail page (Customer Notice variable) will be under each requested verification.

Example of MC 355 Verification Form table:

Residence

Verification of your current address (rent receipt, utility bill, etc.).

Person	Customer Notice
Jane Doe	Current water, electric, gas, or landline bill.

Note: See Supporting Document #6 for Form and Verification mapping.

2.8.2.5 Update Logic for Mailing Address and Form Language

Use the Primary Applicant as the addressee for the MC 355 Form and MC 355 Reminder Form if there is only one active MC Program on the case. The existing logic around determining the mailing address and Form language based on the Primary Applicant will still apply.

If there exists more than one active MC Program on a case, use the Primary Applicant on the MC Program that matches the following:

- a. The first MC Program block where the Primary Applicant is one of the persons with a requested verification.

- b. If there does not exist a MC/MSP Program with (a) then the MC Program that has all persons with a requested verification.

Note: Since a person can be placed on more than one MC Program on a case, there can be a situation where there is a MC Program with all persons requiring verifications and another MC Program with one or more persons requiring verifications. In this scenario the MC Program with all persons would be the one used to determine the Primary Applicant.

- c. If there does not exist a MC Program with (a) or (b) then the first MC Program on the case that has at least one person with a requested verification.

Note: If the persons with requested verifications are across different MC Programs on a case and the MC Program that the Primary Applicant that was addressed to on the first MC 355 closes, a MC 355 Reminder or MC 355 Verification NOA would be sent to a different Primary Applicant than the original MC 355.

2.8.2.6 Remove MC 355 Form from Template Repository

The logic to generate the MC 355 form from the Template Repository will be removed as it will be generated from and managed by the MC 355 Detail page.

Note: The MC 355 Reminder will also not be available in Template Repository.

2.9 Update Batch Form Generation Thread Logic

Update the batch form generation thread logic to update the MC 355 Detail status/Reminder Notice Status to Error if MC 355 form/MC 355 Reminder form does not generate.

If a record is set to Error and it is the initial MC 355, set the End Date of that record to the batch date.

2.10 Update GENERATE_DOC to PRINT_FILE Central Print Staging Logic

Update the GENERATE_DOC to PRINT_FILE central print staging logic to update the MC 355 Detail status/MC 355 Reminder Notice Status to Error if MC 355 Form's/MC 355 Reminder Form's GENERATE_DOC record is not inserted in to PRINT_FILE.

If a record is set to Error and it is the initial MC 355, set the End Date of that record to the batch date.

2.11 Update Central Print Bundling Logic

Update the central print bundling logic to update the MC 355 Detail status/MC 355 Reminder Notice status to 'Sent' when the MC 355 form/MC 355 Reminder Notice form is included in a bundle. When this status is inserted, update the Generation Date to the batch date.

Update the central print bundling logic to update the MC 355 Detail status/MC 355 Reminder Notice status to 'Error', if MC 355 form/MC 355 Reminder form is not bundled.

If a record is set to 'Error' and it is the initial MC 355, set the End Date of that record to the batch date.

2.12 Create a new MC 355 Verifications NOA Reason

2.12.1 Description

A new MC 355 Verification NOA reason will generate for the "Failed to Complete Redetermination" Negative Action for MAGI, Non-MAGI and MSP Programs. This new NOA reason will generate when the worker manually runs EDBC with the "Failed to Complete Redetermination" Negative Action, no RE packet was generated on or after MC 355 Form generation and there is at least one verification that has not been provided and the MC 355 is past due. This new NOA reason will be implemented in English and Spanish (Threshold languages will be implemented in a future SCR).

Note: CIV currently refers to MSP as MPPP. SCR 100174 will update the MPPP reference to MSP. For consistency in the design document MPPP is still referred to as MSP.

See Supporting Documents #2 & 3 for new NOA Fragment FDDs.

Note: The new MC 355 Verification NOA reason will not replace the existing Failed to Complete Redetermination NOA. The existing Failed to Complete Redetermination NOA will still generate when the new MC 355 Verification NOA reason does not generate and the existing triggering conditions apply.

2.12.2 New Fragment Text

The following are the Fragment Sections that will generate for the new NOA Fragment Reason:

Fragment Section Type	Fragment Text	Fragment Description
-----------------------	---------------	----------------------

Static Text	You were sent a Medi-Cal Request for Information Form, the following verification(s) have not been received:	This is static text that will generate only once for the fragment.
Dynamic Section	<Person's Name> <Verification List>	This is a dynamic section that will generate for each Person that has at least one outstanding verification.

Note: The Static Text and dynamic Text put together is the reason fragment language for MAGI, Non-MAGI and MSP programs in CIV. The reason fragment format is slightly different for LRS Non-MAGI Medi-Cal and MSP NOAs and it is listed in FDDs. LRS will use the existing NOA generation logic to generate the MSP and Non-MAGI Medi-Cal MC 355 NOAs.

2.12.3 New Reason Variable Population

The following is the Variable Population for the new MC 355 Verification reason:

Variable Name	Variable Description
Person's Name	Name of the Person (First and Last Name). This will generate in Bold font.
Type	Verification Type from MC 355 list page.
Subtype	Verification Detail from MC 355 List page.
Customer Notice	User entered description from "Customer Notice" section of the "MC 355 Verification Detail" page.
Verification List	Populates with a list of the Verifications that the Person has outstanding. This includes the following Variable fields: Type, Subtype, and Customer Notice. Each verification will be listed with the Type, a dash, the Subtype, and then the Customer Notice value indented on the following line. See example below. The Verifications will be listed in the same order as the MC 355 Form.

Verification List Example:

Test Test

Income - Earned Income

Please provide details of your Earned Income

Income - Unemployment or Disability

Please provide details of your Disability

Kid Test

Residence - Other

Please provide details of your Current Rent

Note: The MC 355 Verification Reason will generate based on the Persons and pending Verifications listed on the MC 355 Detail page and not specifically the persons that are active on the MC Program that the EDBC was run for.

2.12.4 Add New Generation Logic for the new MC 355 Verification Reason

The new MC 355 Verification reason will populate on the NOA when there is at least one outstanding verification and the MC 355 is past due.

Generate this new NOA reason when all the following conditions are true:

- A person or the MC/MSP program has been discontinued due to "Failed to Complete Redetermination" negative action (CT73 Code RD).
- The status on the MC 355 Detail page for a MC 355 Form is either "Sent" or "Incomplete" and there is at least one verification in MC 355 Detail page with either "Pending" or "Refused" status.
- "Verification Due Date" is prior to the EDBC run date.
- A RE packet has not been created on or after the MC 355 Form was generated.

See FDDs in Supporting Section #2 & 3 for LRS specific trigger conditions for the MC 355 Verifications NOA reason for MAGI and non-MAGI as well as the LRS specific existing Header and Footer fragments that will generate with the new MC 355 Verifications NOA reason.

Note: This fragment will only generate once on a NOA.

2.12.5 Add NOA Regulations for new MC 355 Verification NOA Reason

2.12.5.1.1 Add new MC 355 Verification Reason Regulations

The new MC 355 Verification NOA reason will use the same regulations that are currently used for the existing Failed to Complete Redetermination Fragments in LRS.

Add the following Regulations to the new MC 355 Verification NOA reason for both MAGI, Non-MAGI and MSP:

Title 22, CCR Section 50175; Title 22, CCR Section 50189; W&I Code Section 14005.37(i);

Note: The above regulations are formatted for C-IV NOA Regulation logic. See Supporting Document #2, 3 & 7 for FDDs containing formatting of the Regulations for LRS.

2.12.5.1.2 Add the MAGI Regulations Fragment

Add the MAGI Regulations Fragment (LRS: H_TN_MESSAGE1, C-IV: MSG_MAGI_DENIAL_OR_DISCONTINUANCE_REGULATION) for the MC 355 Verification reason. This fragment will populate with the new regulations for the MC 355 Verification reason when there is at least one person on the program that is receiving MAGI benefits.

For C-IV:

Update the logic for the MAGI Regulations Fragment (MSG_MAGI_DENIAL_OR_DISCONTINUANCE_REGULATION) to generate when the new MC 355 Verification reason generates and there is at least one person on the program that is receiving MAGI benefits.

For LRS:

Add the MAGI Regulations Fragment (H_TN_MESSAGE1) as the Footer for the new MC 355 Verification reason when generating the MAGI version of the MC 355 Verification reason.

2.12.6 Update 90 Day Cure Language to Generate with MC 355 Verification Reason

The 90 Day Cure NOA verbiage will generate with the MC 355 Verification reason.

For C-IV:

Update the 90 Day Cure Period Message Fragment (MCD_FAIL_TO_COMPLETE_90_DAY_CURE) NOA logic to generate when the new MC 355 Verification reason generates for MAGI, Non-MAGI or MSP Programs.

Existing C-IV 90 Day Cure Period Message:

“You can still get Medi-Cal, but you need to give us more information. We need it within 90 days, by VARIABLE. We can give you Medi-Cal from VARIABLE if you are still eligible. If we do not get the information by VARIABLE, you must reapply for Medi-Cal.”

Note: For LRS the 90 Day Cure Period verbiage is a part of the MC 355 Verification Reason (as is standard for existing LRS Non-MAGI and MSP reason fragments) and MAGI Footer (H_STATIC_FOOTER).

2.12.7 Update Existing Failed to Complete Redetermination NOA Fragments

Update the existing NOA logic for the Failed to Complete Redetermination Negative Action to not generate the existing Failed to Complete Redetermination NOA fragments when the following is true:

- The EDBC is run past "Verification Due Date" if there exists a MC 355 record.
- The MC 355 is in "Sent" or "Incomplete" Status.
- There is at least one verification in MC 355 Detail page with either "Pending" or "Refused" status.

For C-IV:

Update the logic for the following Failed to Complete Redetermination NOA Fragments:

RSN_MC_FAILED_TO_RESPOND
RSN_MAGI_FAILED_TO_RESPOND

For LRS:

Update the logic for following Failed to Complete Redetermination NOA Fragments:

H_TN_FAIL_REDETERM_RESPONSE_H400
H_TN_FAIL_REDETER_VERIF_H401
MC_TN_FAIL_REDETER_RESPONSE_M400
MC_TN_FAIL_REDETER_VERIF_M401
Q_TN_FAIL_REDETER_RESPONSE_Q400
Q_TN_FAIL_REDETER_VERIF_Q401

See Supporting Documents #1 for updated Failed to Complete Redetermination NOA FDDs.

Note: Existing Failure to Provide NOAs/Fragments will continue to generate based on their existing functionality.

The following are Scenarios for clarification purposes:

Scenario 1: If the Negative Action of "Failed to Complete Redetermination" is taken on the program after the "Verification Due Date" (assuming there is an MC 355 in Pending or Incomplete status and there is at least one verification record in Pending or Refused status) and if there is no RE Packet generated after the MC 355 generation, then it will result in an MC 355 termination NOA.

Scenario 1 Example: MC 355 was generated on April 16th, it is due on May 15th and there is no RE packet generated after MC 355 generation date i.e. April 16th and the "Failed to Complete Redetermination" Negative Action is taken on the case, it results in an MC 355 termination NOA.

Scenario 2: Anytime there is a RE packet generated after and an MC 355 is generated, running the "Failed to Complete Redetermination" negative action on the program will result in the regular Failure to Complete Redetermination NOA.

Scenario 2 Example: MC 355 was generated on April 15th, and an RE packet was generated on April 22nd, and if a Negative Action of "Failed to Complete Redetermination" is taken on the program any time after April 22nd, it results in the existing Failed to Complete Redetermination NOA.

2.13 Batch - MC 355 Detail Record Cleanup

2.13.1 Overview

A new daily batch job will be created to clean up MC 355 records with a 'Pending', 'Sent', or 'Incomplete' status when the associated Medi-Cal Program has been closed.

2.13.2 Description of Change

- 1) Create a new Daily Batch Job to clean up open MC 355 records for Medi-Cal/MSP programs that have been closed after the MC 355 Detail record was created. Identify the population of MC 355 status records that need to be cleaned up using the following criteria:
 - a. The MC 355 Detail Record has a 'Pending', 'Sent', or 'Incomplete' status as of the Batch Date.
 - b. All Medi-Cal programs on the case have a high-dated status record of Denied or Discontinued.
 - c. The most recently accepted and saved high-dated EDBC has a 'Denied' or 'Discontinued' Status AND
 - d. The most recently accepted and saved EDBC's run date is between the last successful date of this batch job and the Batch Date AND

For each MC 355 Detail record returned in the driving query:

- Update The individual verification records for the MC 355 Detail to 'Not Applicable'
- Update The overall MC 355 Detail record to 'Not Applicable'
- Set the end date of The MC 355 Detail record to the batch date.
- Create a new journal entry:
 - Case ID: Case associated to MC 355 Detail record
 - Type: 04 (Document Generated (Batch))
 - Short Description: MC 355 Detail Not Processed
 - Long Description: No active Medi-Cal program for MC 355 Detail generated on <MC355RecordCreateDate>. Record end-dated. MC 355 not generated.
 - Created By: This batch
 - Updated By: This batch

ID	TYPE	NAME	DESCRIPTION	TRIGGER CONDITION
1	Batch	MC 355 Detail Not Processed	No active Medi-Cal program for MC 355 Detail generated on <MC355RecordCreateDate>. Record end-dated.	MC/MSP Program is discontinued where the MC 355 Status was still in Pending, Sent, or Incomplete

2.13.3 Execution Frequency

This Batch Job will run every business day (Monday – Saturday).

2.13.4 Key Scheduling Dependencies

This job will run before the MC 355 sweeps described in subsequent sections

2.13.5 Counties Impacted

This job will run for All Counties.

2.13.6 Data Volume/Performance

N/A

2.13.7 Failure Procedure/Operational Instructions

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

2.14 Batch - Due Date Task Creation

2.14.1 Overview

Add a new nightly batch job to create a task for cases with a past due MC 355. If the "Verification Due Date" on the MC 355 Detail page is advanced after the MC 355 task is created, then a new task will be created for the new due date.

2.14.2 Description of Change

Create a new daily batch job to generate a task as described in the Automated Task Creation section. The new Batch Job will create one task for each case that matches the following criteria:

1. The Medi-Cal Program is 'Pending' or 'Active' as of the Batch Date
2. There exists at least one MC 355 record associated to the case in which the Status is 'Sent' or 'Incomplete' as of the Batch Date
3. The 'Verification Due Date' on the MC 355 detail is between the batch date and the last success date.

See section 2.4.3 for the task description and other information necessary to generate the task.

2.14.3 Execution Frequency

This Batch Job will run every business day (Monday – Saturday).

2.14.4 Key Scheduling Dependencies

This job will run after MC 355 Detail Record Cleanup.

2.14.5 Counties Impacted

All Counties

2.14.6 Data Volume/Performance

N/A

2.14.7 Failure Procedure/Operational Instructions

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

2.15 IFDS Interface Job (LRS only change)

2.15.1 Overview

IFDS Interface Job (PI19C407) triggers MC 355 Form for IFDS abstracts for which PA 2418B (Income and employment verification) Form is generated. With this SCR, IFDS interface job will be updated to not trigger MC 355 Form.

2.15.2 Description of Change

Update the IFDS Interface job (PI19C407) to no longer trigger MC 355 Form.

2.15.3 Execution Frequency

As part of this SCR, there will not be any changes to the execution frequency of this job.

2.15.4 Key Scheduling Dependencies

As part of this SCR, there will not be any changes to the scheduling dependencies of this job.

2.15.5 Counties Impacted

Los Angeles County only.

2.15.6 Data Volume/Performance

N/A.

2.15.7 Interface Partner

CDSS (California Department of Social Services).

2.15.8 Failure Procedure/Operational Instructions

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

2.16 NHR Interface Job (LRS only change)

2.16.1 Overview

NHR Interface Job (PI19C506) triggers MC 355 Form for NHR abstracts for which SAWS30 (employment verification) Form or, PA 2418C Form is generated. With this SCR, NHR interface job will be updated to not trigger MC 355 Form.

2.16.2 Description of Change

Update the NHR Interface job (PI19C506) to no longer trigger the MC 355 Form.

2.16.3 Execution Frequency

As part of this SCR, there will not be any changes to the execution frequency of this job.

2.16.4 Key Scheduling Dependencies

As part of this SCR, there will not be any changes to the scheduling dependencies of this job.

2.16.5 Counties Impacted

Los Angeles County only.

2.16.6 Data Volume/Performance

N/A.

2.16.7 Interface Partner

CDSS (California Department of Social Services).

2.16.8 Failure Procedure/Operational Instructions

No Change.

2.17 Forms Trigger Batch (For MC 355 Form) – PB19R1933 (LRS only change)

2.17.1 Overview

PB19R1933 is a Form trigger batch job for MC 355 (Medi-Cal Request for Information) that picks up programs for processing which have the Form PA 2418B not in the 'Received' status after the Form due date. Also, MC 355 is triggered if the Form PA 2418C is not in the 'Received' status by the Form due date. For each program picked up for processing, Form MC 355 is generated and sent. With this SCR, this batch job will be turned off.

2.17.2 Description of Changes

This batch job will be turned off in production. MC 355 Form will no longer be generated through this Forms trigger batch job.

Note: MC 355 Form will no longer be generated through NHR/IFDS interface jobs. This requirement is captured in section 2.11 and 2.12.

2.18 Kofax Webservice updates for MC 355 Form (LRS only change)

2.18.1 Overview

MC 355 Form is to request verifications from participant for Medi-Cal eligibility. Participants are requested to return the coversheet letter along with the specified verification documents in MC 355 Form. Upon receipt at the district office, workers will scan these forms in EDMS. Webservice request will be sent to LRS with the Case, Program and Form ID.

2.18.2 Description of Changes

Update Kofax webservice call for POSS/ePOSS requests from EDMS to perform the following.

When the request is for MC 355 Form, create a task with the below details.

MC 355 Verifications Received Details - LRS	
Trigger Condition	Verifications have been received with a MC 355 cover sheet.
Task Type	MC 355 Verifications Received
Task Category	MC 355
Task Priority	High
Task Due Date	5 days
Task Expiration Date	30 days
Task Long Description	Update the MC 355 Detail page with verifications received and corresponding Financial/Non-Financial pages.
Guided Navigation	MC 355 Detail page
Task Initial Assignment	Office Distribution

Note: If verification documents are returned without coversheet and the documents are scanned through Kofax POSS/e-POSS batch class then as per current functionality in LRS a generic POSS task will be created for the program worker.

2.19 MC 355 – Barcode generation logic (LRS only change)

Generate barcode on MC 355 coversheet and Form as described below.

- 1st 7 Digits will be the case number.
- Next 2 digits will be 00
- Next 2 digits are populated as the Form ID (00) from CT-329.
- Next 2 digits are populated as month (MM) derived based on the Due date of MC 355 Form.
- Next 4 digits are populated as year (YYYY) derived based on the Due date of MC 355 Form.
- Next 10 digits are populated as the generate_doc_id from database.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	Updates to existing Failed to Complete Redetermination NOAs	 Existing Failure to Complete Redetermination NOAs.zip
2	Correspondence	MC 355 Termination NOA - MAGI	 MAGI Medi-Cal MC 355 Termination.doc
3	Correspondence	MC 355 Termination NOA – Medi-Cal	 Medi-Cal Termination MC 355
4	Correspondence	MC 355 Form FDD	 FD_FRM_MC355_Initial.docx
5	Correspondence	MC 355 Reminder Form FDD	 FD_FRM_MC355_Reminder.docx

6	Correspondence	Matching Subtypes to MC 355 form	 Matching subtypes to MC 355 form.pdf
7	Correspondence	MC 355 Termination NOA - MSP	 MSP Termination MC 355.docx
8	Online	Security Matrix	  CA-50988 - Security Matrix.xls CIV-102852 Security Matrix.xls
9	Correspondence	Spanish Translations	 SCR CA-50988_CIV-10285

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4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	<p>The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including:</p> <ul style="list-style-type: none"> a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices. 	<p>This effort will add Forms notifying of missing verifications and NOAs that will notify of discontinuance due to incomplete or missing verifications that were previously requested.</p>

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met

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5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

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7 APPENDIX

7.1 MC 355 Type and Sub-Type field values, Hyperlink Navigation Mapping

Type	Sub-Type	Hyperlink Navigation	Security Right to Hyperlink Navigation
Income	Earned Income	Income List	IncomeListView
	Self Employed (Schedule C)		
	Unemployment or Disability		
	Veteran's Benefits		
	Social Security Benefits		
	Retirement or Pension		
	Tax Filing Status	Tax Household List	TaxHouseholdView
	RFTHI	<No hyperlink>	<No security right>
	Other	<No hyperlink>	<No security right>
Income Deductions	Child Care	Expense List	ExpensesListView
	Child Support		
	Alimony		
	Health Insurance		
	Other	<No hyperlink>	<No security right>
Information on Person requesting Medi-Cal	California Driver's License or Photo ID	Individual Demographics List	IndividualDemographicListView
	Social Security Number		
	Immigration Documentation	Citizenship Status List	CitizenshipStatusListView
Former Foster Youth	Documented Proof	Other Program Assistance List	OtherProgramAssistanceListView
Residence	Current Rent Receipt	Contact Summary	CaseContactSummaryView
	Current Utility Bill		
	Other		
Personal Property	Vehicle Registration	Property List	
	Bank Accounts - Checking		

	Bank Accounts - Savings		PropertyListView
	Life Insurance Policy		
	Stocks		
	Bonds		
	Retirement Account Statement		
	Other		
	Sold or Traded		
Disability/Incapacity	Social Security Award Letter	Medical Condition List	MedicalConditionListView
	Proof of Physical Disability		
	Proof of Incapacity		
Other	Other	<No hyperlink>	<No security right>

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Design Document

CA – 52237 Reports: Child Welfare Program
Work Order Monthly Reports via Oracle Business
Intelligence

DOCUMENT APPROVAL HISTORY		
	Prepared By	Vallari Bathala
	Reviewed By	Barbara Sakuma Yolanda Garcia-Del Valle Ravneet Bhatia – South BI Team Gokul Suresh – South BI Team Sarbjeet Chana – North BI Team Akira Moriguchi – North System Test Team Christine Altavilla – South System Test Team

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR																																
08/20/2018	.01	Initial Revision	Vallari Bathala																																
07/12/2019	.02	Deleted Appendix Section 6.1 Work Order Programs, Types and Sub Types	Vallari Bathala																																
		<table border="1"> <thead> <tr> <th>Program</th> <th>Type</th> <th>Sub Type</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>AAP</td> <td>Address Change</td> <td>Address Change/Correction</td> <td></td> </tr> <tr> <td>AAP</td> <td>Payee Name Change</td> <td>Add/Remove/Correct Payee</td> <td></td> </tr> <tr> <td>AAP</td> <td>Payment Problem</td> <td>No Active Agreement</td> <td></td> </tr> <tr> <td>AAP</td> <td>Payment Problem</td> <td>AAP Restart</td> <td></td> </tr> <tr> <td>AAP</td> <td>Payment Problem</td> <td>Affidavits</td> <td></td> </tr> <tr> <td>AAP</td> <td>Payment Problem</td> <td>Amount Discrepancy</td> <td></td> </tr> <tr> <td>AAP</td> <td>Payment Problem</td> <td>Direct Deposit</td> <td></td> </tr> </tbody> </table>		Program	Type	Sub Type	Due Date	AAP	Address Change	Address Change/Correction		AAP	Payee Name Change	Add/Remove/Correct Payee		AAP	Payment Problem	No Active Agreement		AAP	Payment Problem	AAP Restart		AAP	Payment Problem	Affidavits		AAP	Payment Problem	Amount Discrepancy		AAP	Payment Problem	Direct Deposit	
		Program		Type	Sub Type	Due Date																													
		AAP		Address Change	Address Change/Correction																														
		AAP		Payee Name Change	Add/Remove/Correct Payee																														
		AAP		Payment Problem	No Active Agreement																														
		AAP		Payment Problem	AAP Restart																														
		AAP		Payment Problem	Affidavits																														
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AAP	Payment Problem	Direct Deposit																																	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION				AUTHOR
						Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Problem	No Payment	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Problem	Payment Research	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Problem	Returned Warrant	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Problem	Other	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	PAS Age Rate Increase	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	PAS Reassessment: Age Extension	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	PAS Reassessment: Early Start (P1)	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	PAS Reassessment: Dual Agency (P2)	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	Rate Decrease	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	Incorrect Start/Stop Date	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		AAP	Payment Resolution	Other	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C

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		AAP	Payment Stop	Deceased AP Payee	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		AAP	Payment Stop	Child No Longer in Home	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		AAP	Income Verification	Verify AAP Payment	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		AAP	ICAMA	ICAMA	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		AAP	Other	Open Text Box	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Address Change	Relative/NFRM	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Address Change	Within Group Home/FFA	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Address Change	SILP	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Payment Problem	Payment Research	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Payment Problem	No Payment	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Payment Problem	Rate	20	Closed in <=20 Days - Closed in >20 Days - C Open for <=20 Days - Open for >20 Days - C
		Foster Care	Payment Problem	Affidavit	20	Closed in <=20 Days - Closed in >20 Days - C

DATE	DOCUMENT VERSION	REVISION DESCRIPTION				AUTHOR
						Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Problem	Returned Warrant	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Problem	Miscellaneous	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Problem	Clothing Allowance	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Problem	No Vendor Number	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Resolution	Voucher Needed	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Resolution	Incorrect Rate/Rate Change	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Resolution	Incorrect Start/Stop Date	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Payment Resolution	Miscellaneous	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Income Verification	Income Verification	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Foster Care	Other	Open Text Box	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Address Change	Address Change	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C

DATE	DOCUMENT VERSION	REVISION DESCRIPTION				AUTHOR
		Kin-GAP	Payment Problem	No Payment	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	Rate	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	Affidavit	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	Payment Research	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	Returned Warrant	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	Clothing Allowance	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	No Vendor Number	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Problem	Miscellaneous	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Resolution	Incorrect Start/Stop Date	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Resolution	Incorrect Rate/Rate Change	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Payment Resolution	Miscellaneous	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Income Verification	Agreement Letter	20	Closed in <=20 Days – Closed in >20 Days – C

DATE	DOCUMENT VERSION	REVISION DESCRIPTION				AUTHOR
						Open for <=20 Days – Open for >20 Days – C
						Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Kin-GAP	Other	Open Text Box	20	Open for <=20 Days – Open for >20 Days – C
		Medi-Cal	Emergency	Infant (0-2 years)	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Emergency	Medically Fragile	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Emergency	Minor in Hospital/ER	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Emergency	Out of Psycho-tropic Medication	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	CEC	Approval	22	Closed in <=22 Days – Closed in >22 Days – C Open for <=22 Days – Open for >22 Days – C
		Medi-Cal	CEC	Correction	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	CEC	Denial	22	Closed in <=22 Days – Closed in >22 Days – C Open for <=22 Days – Open for >22 Days – C
		Medi-Cal	CEC	Other	22	Closed in <=22 Days – Closed in >22 Days – C Open for <=22 Days – Open for >22 Days – C
		Medi-Cal	Transitional	Youakim Denial Referral	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Medi-Cal	Transitional	Denied CEC	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C

DATE	DOCUMENT VERSION	REVISION DESCRIPTION				AUTHOR
		Medi-Cal	Transitional	Expiring CEC	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Medi-Cal	Transitional	Other	20	Closed in <=20 Days – Closed in >20 Days – C Open for <=20 Days – Open for >20 Days – C
		Medi-Cal	Medi-Cal	Aid Code	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	BIC Request	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Disenrollment	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Release Hold Request	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Medi-Cal Card not Working	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	DOB	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Name	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Resident County Code	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Address	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Case Number	3	Closed in <=3 Days – C Closed in >3 Days – Cl

DATE	DOCUMENT VERSION	REVISION DESCRIPTION				AUTHOR
						Open for <=3 Days – C Open for >3 Days – Op
						Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Correction	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	Intake	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Medi-Cal	SSN	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
		Medi-Cal	Other	Open Text Box	3	Closed in <=3 Days – C Closed in >3 Days – Cl Open for <=3 Days – C Open for >3 Days – Op
7/17/2019	.02	<p>Change in Month filter description, the Prompt section, in Work Order Status Summary Dashboard Page Layout.</p> <p>Before: Multi-select option to filter data by the month. The data will display as of the day a user is viewing the dashboard.</p> <p>After: Single-select option to filter data by the month. The data will display as of the day a user is viewing the dashboard.</p>				Vallari Bathala
07/30/2019	.03	<p>Changed the description of HSA III in 6.2 Position to remove reference to Section.</p> <p>Before: The active worker number associated to the Assigned Worker's Office and Section, with type Director</p> <p>After: The active worker number associated to the Assigned Worker's Office with type Director</p>				Vallari Bathala

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1 OVERVIEW

1.1 Current Design

The **EW Work Order Status Summary** report is available via a third-party tool called **EW WORKS**. This tool allows users to view the number of open Work Orders which are on time or late as well as closed Work Orders which are on time or late. In addition, the report breaks down the number of Work Orders by Work Order 'Program', Work Order 'Type' and further down into the 'Sub Type' of Work Orders. The report can be viewed for a single month, or all report months, depending on the needs of the end-user.

1.2 Requests

EW WORKS is the stand-alone tool used for monthly management reports on Work Orders and task tracking. However, the EW WORKS functionality is being discontinued. The robust set of reports on Work Orders and task tracking must be built using other reporting solutions.

1.3 Overview of Recommendations

Develop a new **Business Intelligence (BI) dashboard** page which provides the same information for Work Orders as the EW WORKS report. The dashboard must:

1. Include the Work Order counts for Work Orders closed within the due date, Work Orders closed after the due date, Work Orders open within the due date and Work Orders open after the due date. The counts will then be further divided by the Work Order's '**Program**', '**Type**' and then further divided by its '**Sub Type**'.

Note:

- 1) Due dates are automatically calculated by the application when a work order is saved.
 - 2) Work Orders are classified by 'Program', 'Type' and 'Sub Type' in the application when a work order is created.
 - 3) Closed Work orders are set in the application as 'Completed'.
 - 4) Open Work Orders are set in the application as any one of the following selections: 'Pending', 'Assigned' and 'In Progress'.
2. Calculate the percentage of total for Work Orders closed within the due date, Work Orders closed after the due date, Work Orders open within the due date and Work Orders open after the due date. The percentages will then be divided by the Work Order's 'Program', 'Type' and further divided by its 'Sub Type'. The percent calculations will be as follows:
 - a. Percent of Work Orders Closed by Program = $(\text{Work Orders Closed by Program} / \text{Total Number of Work Orders by Program}) * 100$
 - b. Percent of Work Orders Closed by Type = $(\text{Work Orders Closed by Type} / \text{Total Number of Work Orders by Type}) * 100$
 - c. Percent of Work Orders Closed by Sub Type = $(\text{Work Orders Closed by Sub Type} / \text{Total Number of Work Orders Sub Type}) * 100$
 - d. Percent of Work Orders Open by Program = $(\text{Work Orders Open by Program} / \text{Total Number of Work Orders by Program}) * 100$

- e. Percent of Work Orders Open by Type = (Work Orders Open by Type / Total Number of Work Orders by Type) * 100
- f. Percent of Work Orders Open by Sub Type = (Work Orders Open by Sub Type / Total Number of Work Orders Sub Type) * 100
- 3. For Work Orders that are 'Closed', calculate the number of days between the created day of the Work Order until its completion. This will determine if the work order is '**Closed On Time**' or '**Closed Late**'.
- 4. For Work Orders that are 'Open', count the number of days from its due date until the current day. This will determine if the Work Order is '**Open On Time**' or '**Open Late**'.

The BI dashboard will also include data on Work Orders which have a **Child Protective Services (CPS)** program and are not associated to a case. CPS Work Orders are identified in a work order if the caller does not have a known eligibility case number for reference. This will allow users to easily identify Work Orders that need immediate action.

1.4 Assumptions

Assumption Point	Details	Potential Impact
1.	Status "Closed" will equate to the following status found in the Work Order Detail page: <ul style="list-style-type: none"> • Completed 	The verbiage "Completed" will only be used when referring to case lists in this design and in the dashboard.
2.	Status "Open" equates to the following statuses found in the Work Order Detail page: <ul style="list-style-type: none"> • Pending • Assigned • In Progress 	The verbiage "Pending", "Assigned" and "In Progress" will not be used in the document or in the dashboard.
3.	"On Time" refers to Work Orders closed or still open before or as of the due date.	The entire dashboard including second and third level reports, and case lists.
4.	"Late" equates to Work Orders closed or still open after the due date.	The entire dashboard including second and third level reports, and case lists.
5.	Work Order "Status" refers to the following: <ul style="list-style-type: none"> - Closed - Closed On Time - Closed Late - Open - Open On Time 	This verbiage is used throughout the document as well as the dashboard.

Assumption Point	Details	Potential Impact
	- Open Late	
6.	Case list which include "Complete" as part of the title refer to Work Orders which are closed.	Case Lists
7.	Case list which include "Not Complete" as part of the title refer to Work Orders which are open.	Case Lists
8.	"Worker ID" in CalACES is a suitable replacement for "EW File Number"	All reports throughout the dashboard will be replaced with the worker number.
9.	"Deputy" refers to the HSA I Name who supervises one or more Eligibility Supervisors (Unit Supervisors) in one or more Offices	Case Lists and Prompts mention Deputy throughout the dashboard.
10.	"Director" refers to the HSA III Name who supervises one or more HSA I's in one or more Offices.	Case Lists and Prompts mention Director throughout the dashboard.
11.	Historical data reflects Work Order information as of the last ETL run date. i.e. In present day, if the status of a Work Order, created months before, is changed from the current status to a new status, the dashboard will reflect the new information when prompted for that month. The previous status will no longer be available.	The entire dashboard including second and third level reports, and case lists.
12.	Due Days are calculated with Create Date as the day zero. The day after Create Date will count as the first day.	All reports and/or case lists where number of days is calculated.
13.	Due Days calculations must not count weekends or County Holidays.	Due Days will have to be recalculated annually to account for change in weekend days and County Holiday days.
14.	If data does not exist for any attribute or combination of attributes, the attribute or attributes will not be displayed.	The entire dashboard including second and third level reports, and case lists.

Assumption Point	Details	Potential Impact
15.	The report(s) will not display data that is not available in the application. If data does not exist in the application the dashboard will display 'Unknown'.	The entire dashboard including second and third level reports, and case lists.
16.	Information will be pulled from the Worker associated to the Program.	The entire dashboard including second and third level reports, and case lists.
17.	Work Orders with Medi-Cal program only include Child Welfare Program Medi-Cal.	The entire dashboard including second and third level reports, and case lists.
18.	If a Worker associated to a Work Order is a DPSS worker, the information will still be displayed.	The entire dashboard including second and third level reports, and case lists.
19.	Codes for Programs, Types and Sub Types are maintained in the database. If any new Programs, Types and/or Sub Types are created, the dashboard will reflect this change accordingly.	The entire dashboard including second and third level reports, and case lists.
20.	The position hierarchy will be: Director, followed by Office, followed by Deputy, followed by Unit, Supervisor Name and followed by Worker ID	The entire dashboard including second and third level reports, and case lists.
21.	CWS/CMS Case Number is not a required field in Work Order. If a work order is not associated to a case, it also may not have a CWS/CMS Case Number.	Case Lists with have the CWS/CMS Case Number column.
22.	Mockups in design are only examples of how the data will look and might now always be accurate to actual data.	The entire dashboard including second and third level reports, and case lists.

2 RECOMMENDATIONS

2.1 Work Order Dashboard

2.1.1 Overview

The **Work Order Status** dashboard page will provide metrics on the statuses of Work Orders. The information in this dashboard shall reflect data available in the Work Order List and Work Order Detail pages in the application. The dashboard page will update nightly and focus on how many Work Orders were closed within the due date or after the due date, and how many were open before the due date or open after the due date. The page will also provide metrics on Work Orders by 'Program', 'Type', 'Sub Type' and even drill down to a granular case list.

2.1.2 Page Description

Table 1 – Page

Dashboard Name	Page Name
Work Order	Work Order Status
Work Order	Work Order Status Summary

2.1.3 Metric Definition

Table 2 – Metrics

Metric Name	Metric Definition	Related Widget
Total Closed	The number of Work Orders closed in the prompted month(s).	Grand Total
Closed On Time	The number of Work Orders closed on or before the due date in the prompted month(s). Note: See Appendix: Metrics for examples.	Grand Total
Closed Late	The number of Work Orders closed after the due date in the prompted month(s).	Grand Total

	Note: See Appendix: Metrics for examples.	
Total Open	The number of Work Orders open in the prompted month(s). Note: See Appendix: Metrics for examples.	Grand Total
Open On Time	The number of Work Orders still open on or before the due date in the prompted month(s). Note: See Appendix: Metrics for examples.	Grand Total
Open Late	The number of Work Orders still open after the due date in the prompted month(s). Note: See Appendix: Metrics for examples.	Grand Total
# of Work Orders	The total Work Orders created and completed in the prompted month(s). Note: See Appendix: Metrics for examples.	# of Work Orders by Program, # of Work Orders by Type, # of Work Orders Closed by Sub Type, # of Work Orders Open by Sub Type and # of Work Orders Without Case Number
% of Work Orders	The percent of total Work Orders created and completed in the prompted month(s). Note: See Appendix: Metrics for examples.	% of Work Orders by Program and % of Work Orders by Type
Sub Total	Total of all Work Orders, open and closed, in the prompted month(s). The calculations are done at	# of Work Orders by Program and # of Work Orders by Type

	<p>the Program, Type and Sub Type levels.</p> <p>Note: See Appendix: Metrics for examples.</p>	
# of Work Orders Closed On Time	<p>The number of Work Orders which were closed before or on the Due Date by a worker in the prompted month(s).</p> <p>Note: See Appendix: Metrics for examples.</p>	# of Work Orders by Program, # of Work Orders by Type, # of Work Orders Closed by Sub Type
# of Work Orders Closed Late	<p>The number of Work Orders which were closed after the Due Date by a worker in the prompted month(s).</p> <p>Note: See Appendix: Metrics for examples.</p>	# of Work Orders by Program, # of Work Orders by Type, # of Work Orders Closed by Sub Type
# of Work Orders Open On Time	<p>The number of open Work Orders which are open before or on the Due Date in the prompted month(s).</p> <p>Note: See Appendix: Metrics for examples.</p>	# of Work Orders by Program, # of Work Orders by Type and # of Work Orders Open by Sub Type
# of Work Orders Open Late	<p>The number of open Work Orders which still open past the Due Date in the prompted month(s).</p> <p>Note: See Appendix: Metrics for examples.</p>	# of Work Orders by Program, # of Work Orders by Type and # of Work Orders Open by Sub Type
% of Work Orders Closed	<p>Percent of total Work Orders which were closed in the prompted month(s). The calculation includes all work orders regardless of when the work orders were opened.</p>	% of Work Orders by Program, % of Work Orders Closed by Type and % of Work Orders Closed by Sub Type

	<p>Note:</p> <ol style="list-style-type: none"> 1) See Appendix: Calculations for more information on how to calculate this metric. 2) See Appendix: Metrics for examples. 	
% of Work Orders Open	<p>Percent of total Work Orders which are open in the prompted month(s). The calculation includes all work orders regardless of when the work orders were closed.</p> <p>Note:</p> <ol style="list-style-type: none"> 1) See Appendix: Calculations for more information on how to calculate this metric. 2) See Appendix: Metrics for examples. 	% of Work Orders by Program, % of Work Orders Closed by Type and % of Work Orders Open by Sub Type
Number of Days Late	<p>Number of days that the work order is open past the Due Date. This number is calculated dynamically for all work orders.</p> <p>Note:</p> <ol style="list-style-type: none"> 1) Must exclude weekends and holidays 2) See Appendix: Calculations for the equation 3) Note: See Appendix: Metrics for examples. 	Work Order Case Summary: Completed – Case List and Work Order Case Summary: Not Completed – Case List
Number of Days to Complete	<p>Number of days it took for a work order to reach 'Complete' status. This</p>	Work Order Case Summary: Completed – Case List

	<p>number is calculated dynamically for all work orders.</p> <p>Note:</p> <ol style="list-style-type: none">1) Must exclude weekends and holidays2) See Appendix: Calculations for the equation3) Note: See Appendix: Metrics for examples.	
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2.1.4 Work Order Status Dashboard Page Layout



2.1.4.1 Prompt Detail

* Month: 03/2018	Program: --Select Value--	Type: --Select Value--	Sub Type: --Select Value--	Status: <input type="checkbox"/> Closed <input type="checkbox"/> Open	Director Name: --Select Value--
Office: --Select Value--	Deputy Name: --Select Value--	Unit: --Select Value--	Supervisor Name: --Select Value--	Assigned Worker ID: --Select Value--	<input type="button" value="Apply"/> <input type="button" value="Reset"/>

Table 3 – Prompt Description

Filter Name	Default Value	Filter Type
*Month	Current Month	Multi-select option to filter data by the month. The data will display as of the day a user is viewing the dashboard.
Program	All	Multi-select option to filter data by Work Order 'Programs'. See Work Order Programs, Types and Sub Types in the Appendix for full list.
Type	All	Multi-select option to filter data by Work Order 'Types'. See Work Order Programs, Types and Sub Types in the Appendix for full list.
Sub Type	All	Multi-select option to filter data by Work Order 'Sub Types'. See Work Order Programs, Types and Sub Types in the Appendix for full list.
Status	Unchecked	Check box option to filter the results for ' Closed ' Work Orders and/or ' Open ' Work Orders. Note: If both options are unchecked, then the page will display all results.
Director Name	All	Multi-select option to filter data by Director.
Office	All	Multi-select option to filter data by Office name.
Deputy Name	All	Multi-select option to filter data by Deputy.
Unit	All	Multi-select option to filter data by Unit.
Supervisor Name	All	Multi-select option to filter data by Supervisor.
Assigned Worker ID	All	Multi-select option to filter data by Worker number assigned to the Work Order.

Table 4 - Logic for parameters will be as follows:

Dashboard Page	Parameters Addition	Parameter Description
Work Order Status	Add "Month" dropdown prompt.	This is a mandatory field which displays the month as of the day the dashboard is viewed. At least one month

Dashboard Page	Parameters Addition	Parameter Description
		must be selected to filter the dashboard. The values will be in MM/YYYY format.
	Add "Program" dropdown after "Month".	The values will be all 'Programs' associated to Work Orders.
	Add "Type" dropdown after "Program".	The values will be all 'Types' associated to Work Orders. The dropdown values will change dynamically depending on the 'Program'.
	Add "Sub Type" dropdown after "Type".	The values will be all 'Sub Types' of Work Orders. The dropdown values will change dynamically depending on the 'Type'.
	Add "Status" check boxes after "Sub Type".	The values will be: - Closed - Open
	Add "Director Name" dropdown after "Status".	The values will be limited to the person who supervises one or more Deputies in one or more Offices.
	Add "Office" dropdown after "Director".	The values will be limited to those in the user's County. The dropdown values will change dynamically depending on the 'Director Name'.
	Add "Deputy Name" dropdown after "Office".	The values will be limited to the person who supervises one or more Eligibility Unit Supervisors in one or more Offices. The dropdown values will change dynamically depending on the 'Office'.
	Add "Unit" dropdown after "Deputy".	The values will be limited to those in the user's County. The dropdown values will change dynamically depending on the 'Deputy Name'.

Dashboard Page	Parameters Addition	Parameter Description
	Add "Supervisor Name" dropdown after "Office".	The values will be limited to the person who supervises the worker assigned to a work order. The dropdown values will change dynamically depending on the 'Unit'.
	Add "Assigned Worker ID" dropdown after "Unit".	The values will be workers assigned to a work order. The values will be limited to the those in the user's County. The dropdown values will change dynamically depending on the 'Supervisor Name' depending on the available in the data set.

Note: * indicates that the filter 'Month' is always required.

2.1.4.2 Widget Details

2.1.4.2.1 Grand Total

Widget shall display the total number of Work Orders which were closed on time, closed late, open on time and open late during the prompted month or months.

1. The report shall have six performance tiles. Each tile will display the grand total for the following metrics:
 - a. Total Closed
 - i. Closed On Time
 - ii. Closed Late
 - b. Total Open
 - i. Open On Time
 - ii. Open Late
2. The report will sum the values for all months for each of the metrics when filtered for multiple months.

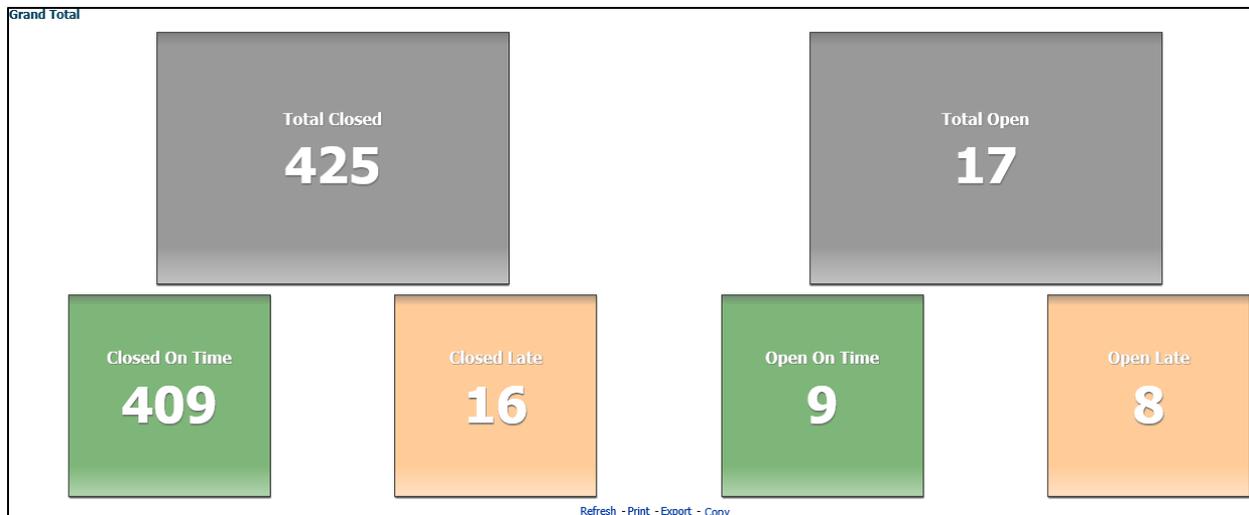


Figure 2.1.4.2.1 - Grand Total – Performance Tiles

2.1.4.2.2 # of Work Orders by Program

Widget shall display the number of Work Orders which were closed on time, closed late, open on time and open late by Program during the prompted month(s).

1. The widget shall toggle between 'Bar Graph' and 'Pivot Table'
 - a. 'Bar Graph' view shall be the first to load by default and 'Pivot Table' view will be the second option.
 - b. The 'Bar Graph' shall display all 'Programs' for single, or multiple, prompted months for each of the following metrics:
 - i. # of Work Orders Closed On Time
 - ii. # of Work Orders Closed Late
 - iii. # of Work Orders Open On Time
 - iv. # of Work Orders Open Late
 - c. The 'Pivot Table' view shall display the subtotal of all Work Orders for each Program.
 - d. The 'Pivot Table' shall also display a grand total of Work Orders by status.
2. The report will sum the values for all months for each 'Program' and metric when filtered for multiple months.

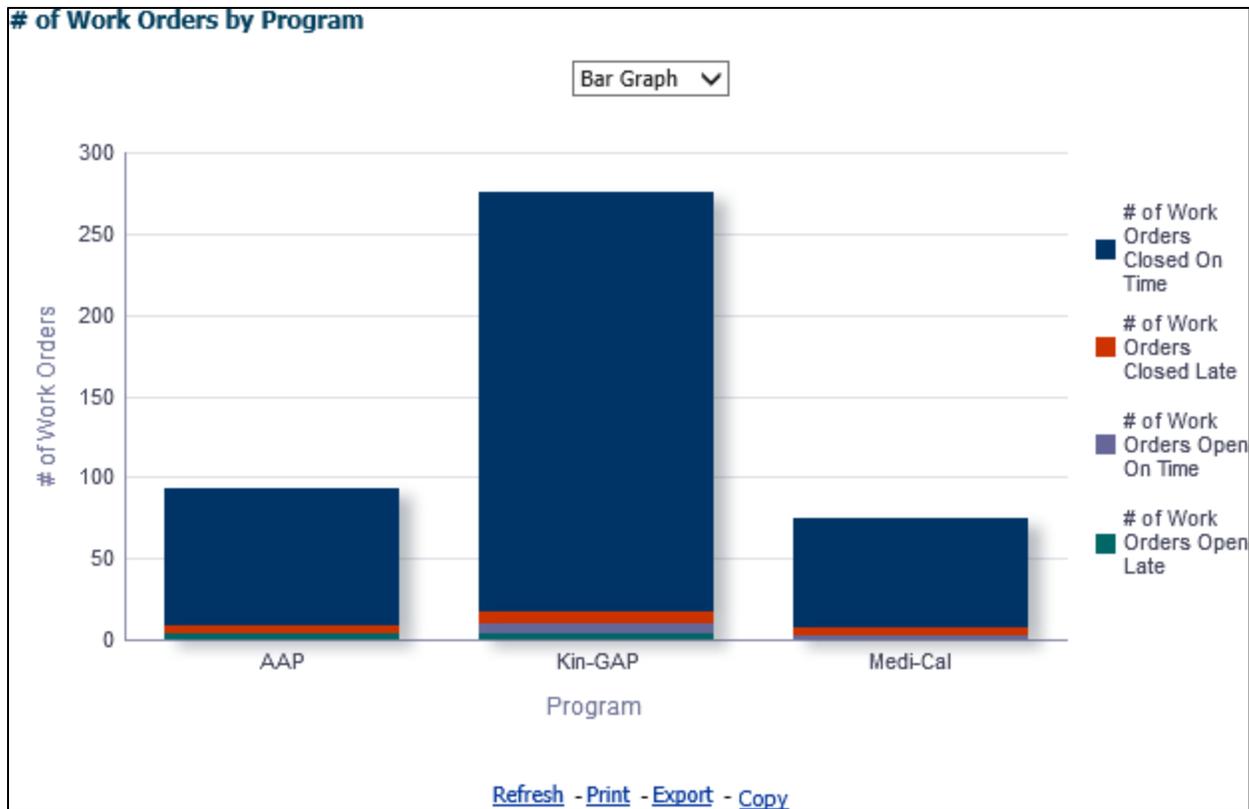


Figure 2.1.4.2.2-1 - # of Work Orders by Program – Bar Graph

Program	# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	Sub Total
AAP	84	5	0	4	93
Kin-GAP	258	7	6	4	275
Medi-Cal	67	4	3	0	74
Grand Total	409	16	9	8	442

Figure 2.1.4.2.2-2 - # of Work Orders by Program – Pivot Table

3. From the top-level 'Pivot Table' and 'Bar Graph' views, the widget will drill down to a second-level widget: [# of Work Orders by Type](#).
4. From the top-level 'Pivot Table' and 'Bar Graph' views, the widget will also have the option to drill down to one of two case lists. The conditions are as follows:
 - a. Values under metrics # of Work Orders Closed on Time and # of Work Orders Closed Late will drill down to: [Work Order Status: Completed - Case List](#).
 - b. Values under metrics # of Work Orders Open on Time and # of Work Orders Open Late will drill down to: [Work Order Status: Not Completed - Case List](#).
 - c. See [General OBIEE Function Mockup: Drill Links](#) for more details about case lists.

2.1.4.2.3 # of Work Orders by Type

Widget shall display the number of Work Orders which were closed on time, closed late, open on time and open late by 'Type' during the prompted month(s).

1. The widget shall be available as the second-level option from the top-level [# of Work Order by Program](#) graph.
2. The widget shall toggle between 'Bar Graph' and 'Pivot Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Pivot Table' will be the second option.
 - b. The 'Bar Graph' shall display all 'Types' associated with the 'Program' selected at the top-level.
 - c. The 'Types' of Work Order are displayed as:
 - i. # of Work Orders Closed On Time
 - ii. # of Work Orders Closed Late
 - iii. # of Work Orders Open On Time
 - iv. # of Work Orders Open Late
 - d. The table view shall display the subtotal of all Work Orders for each 'Type'.
 - e. The table shall also display a grand total of Work Orders by status.
3. The report will sum the values for all months for each 'Type' and metric when filtered for multiple months.

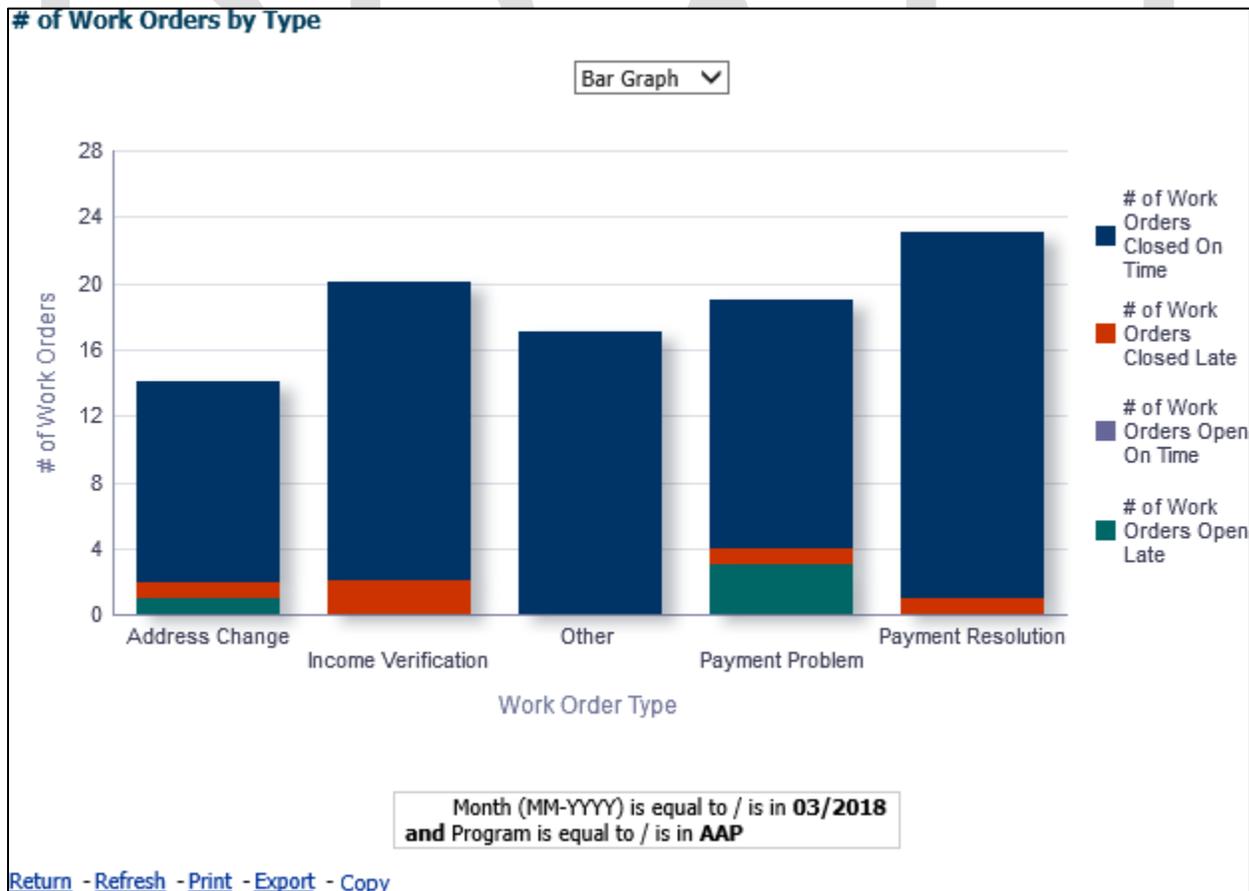


Figure 2.1.4.2.3-1 - # of Work Orders by Type – Bar Graph

# of Work Orders by Type					
Pivot Table ▼					
Work Order Type	# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	Sub Total
Address Change	12	1	0	1	14
Income Verification	18	2	0	0	20
Other	17	0	0	0	17
Payment Problem	15	1	0	3	19
Payment Resolution	22	1	0	0	23
Grand Total	84	5	0	4	93

Month (MM-YYYY) is equal to / is in **03/2018**
and Program is equal to / is in **AAP**

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Copy](#)

Figure 2.1.4.2.3-2 - # of Work Orders by Type – Pivot Table

4. From the second-level 'Pivot Table' and 'Bar Graph' views, the widget will drill down to two third-level graphs: [# of Work Orders Open by Sub Type](#) and [# of Work Orders Closed by Sub Type](#).
5. From the second-level 'Pivot Table' and 'Bar Graph' views, the widget will also have the option to drill down to one of two case lists. The conditions are as follows:
 - a. Values under metrics # of Work Orders Closed on Time and # of Work Orders Closed Late will drill down to: [Work Order Status: Completed - Case List](#).
 - b. Values under metrics # of Work Orders Open on Time and # of Work Orders Open Late will drill down to: [Work Order Status: Not Completed - Case List](#).
 - c. See [General OBIEE Function Mockup: Drill Links](#) for more details about case lists.

2.1.4.2.4 # of Work Orders Open by Sub Type

Widget shall display the total number of total Work Orders which were open on time and open late by 'Sub Type' during the prompted month(s).

1. The widget will be the third-level 'Bar Graph' option from [# of Work Orders by Type](#)
2. The widget shall toggle between 'Bar Graph' and 'Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Table' will be the second option.
 - b. The 'Bar Graph' shall display all 'Sub Types' associated with the top-level 'Type'.
 - c. The 'Table' view shall display the subtotal of all Work Orders for each 'Sub Type'.
 - d. The 'Table' shall also display a grand total of Work Orders by status.
 - e. The 'Sub Types' of Work Order are displayed as:
 - i. # of Work Orders Open On Time
 - ii. # of Work Orders Open Late
3. The report will sum the values for all months for each 'Sub Type' and metric when filtered for multiple months.

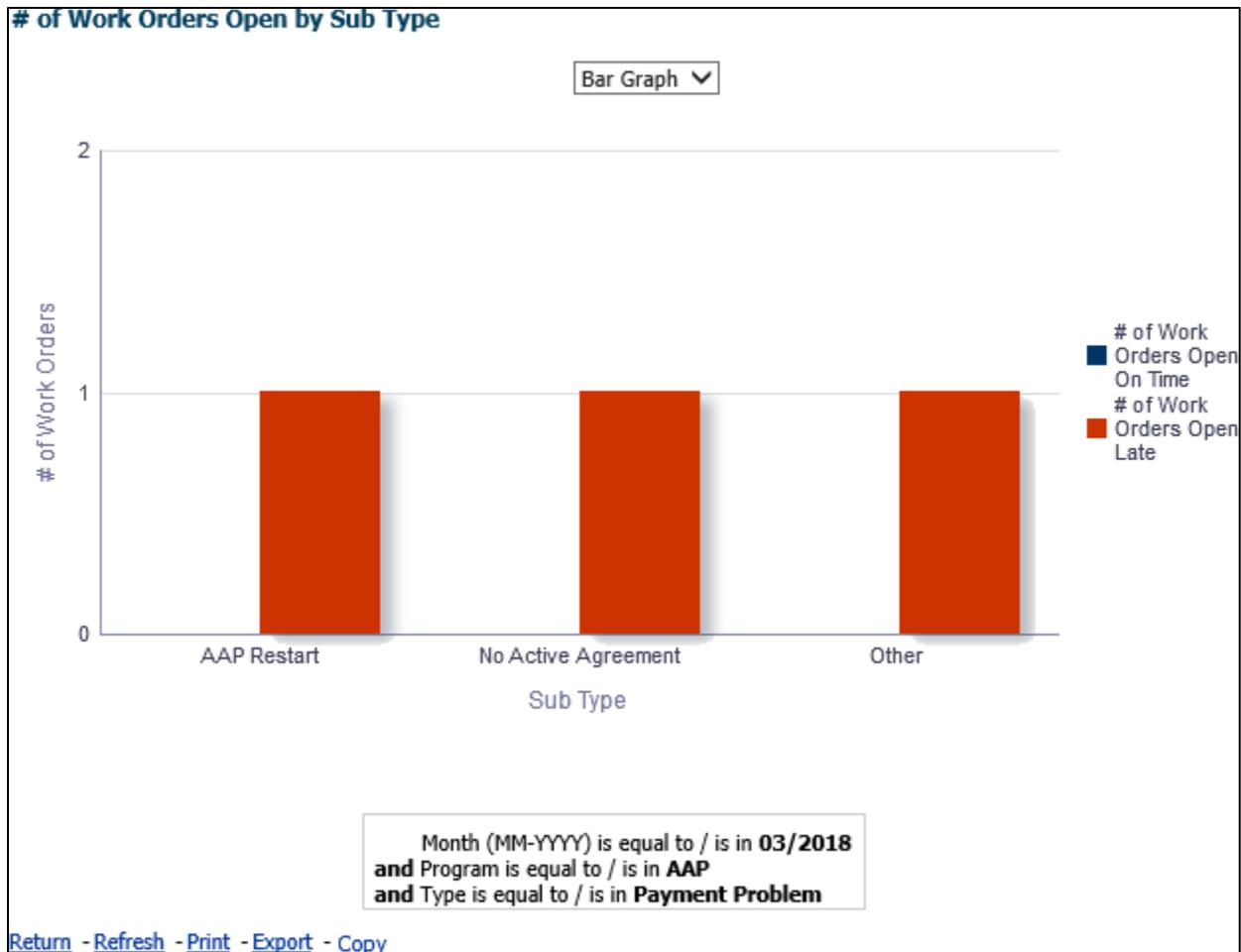


Figure 2.1.4.2.4-1 - # of Work Orders Open by Sub Type – Bar Graph

of Work Orders Open by Sub Type

Table

Sub Type	# of Work Orders Open On Time	# of Work Orders Open Late	Sub Total
AAP Restart	0	1	1
No Active Agreement	0	1	1
Other	0	1	1
Grand Total	0	3	3

Month (MM-YYYY) is equal to / is in **03/2018**
 and Program is equal to / is in **AAP**
 and Type is equal to / is in **Payment Problem**

Return - Refresh - Print - Export - Copy

Figure 2.1.4.2.2-2 - # of Work Orders Open by Sub Type – Table

- From the third-level 'Table' and 'Bar Graph' views, the widget will drill down to a fourth-level case list: [Work Order Status: Not Completed - Case List](#).

a. See [General OBIEE Function Mockup: Drill Links](#) for more details.

2.1.4.2.5 # of Work Orders Closed by Sub Type

Widget shall display the total number of total Work Orders which were closed on time and closed late by 'Sub Type' during the prompted month(s).

1. The widget will be the third-level 'Bar Graph' option from [# of Work Orders by Type](#)
2. The widget shall toggle between 'Bar Graph' and 'Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Table' will be the last option.
 - b. The 'Bar Graph' shall display all 'Sub Types' associated with the top-level 'Type'.
 - c. The table view shall display the subtotal of all Work Orders for each 'Sub Type'.
 - d. The table shall also display a grand total of Work Orders by status.
 - e. The 'Sub Types' of Work Order are displayed as:
 - i. # of Work Orders Closed On Time
 - ii. # of Work Orders Closed Late
3. The report will sum the values for all months for each 'Sub Type' and metric when filtered for multiple months.

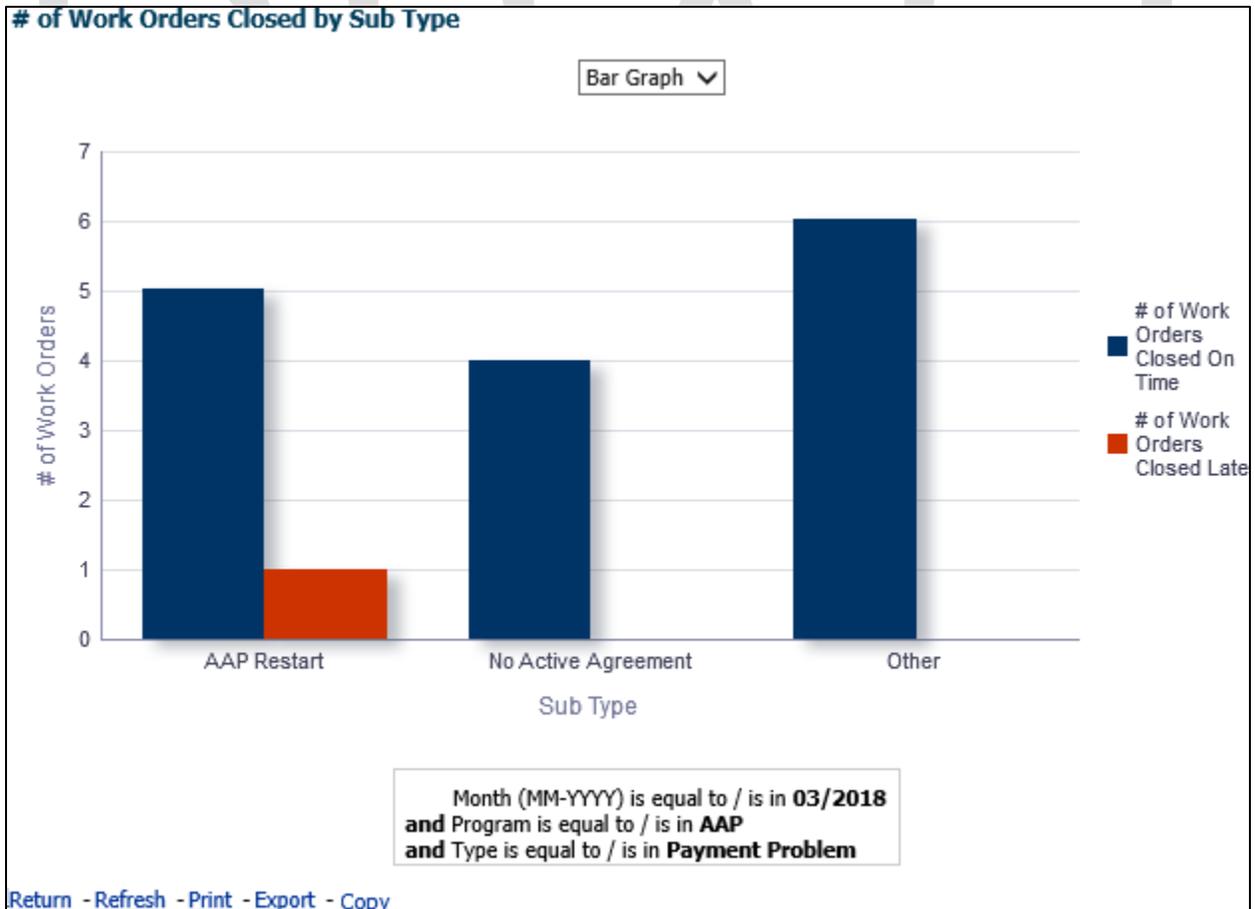


Figure 2.1.4.2.5-1 - # of Work Orders Closed by Sub Type – Bar Graph

of Work Orders Closed by Sub Type

Table ▾

Sub Type	# of Work Orders Closed On Time	# of Work Orders Closed Late	Sub Total
AAP Restart	5	1	6
No Active Agreement	4	0	4
Other	6	0	6
Grand Total	15	1	16

Month (MM-YYYY) is equal to / is in **03/2018**
 and Program is equal to / is in **AAP**
 and Type is equal to / is in **Payment Problem**

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Copy](#)

Figure 2.1.4.2.5-2 - # of Work Orders Closed by Sub Type – Table

4. From the third-level table and 'Bar Graph' views, the widget will drill down to a fourth-level case list: [Work Order Status: Completed - Case List](#).
 - a. See [General OBIEE Function Mockup: Drill Links](#) for more details.

2.1.4.2.6 % of Work Orders by Program

Widget shall display the percentage of total Work Orders which were closed on time, closed late, open on time and open late by Program during the prompted month(s).

1. The widget shall toggle between 'Bar Graph' and 'Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Table' will be the second option in the view dropdown.
 - b. The 'Bar Graph' and 'Table' shall display all 'Programs' for the following metrics:
 - i. % of Work Orders Closed
 - ii. % of Work Orders Open
2. The report will calculate the percentage for all months for each 'Program' and metric when filtered for multiple months.

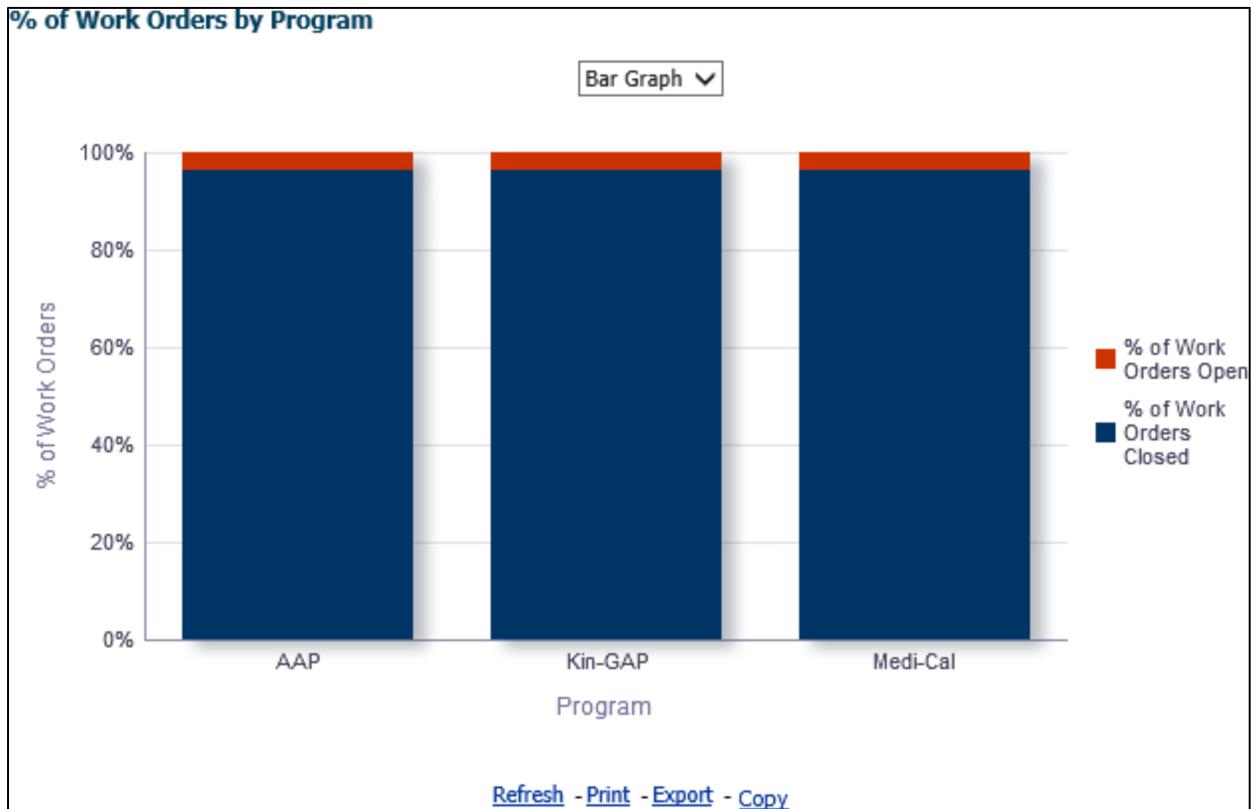


Figure 2.1.4.2.6-1 - % of Work Orders by Program – Bar Graph

Table

Program	% of Work Orders Closed	% of Work Orders Open
AAP	96.00%	4%
Kin-GAP	96.00%	4%
Medi-Cal	96.00%	4%

Refresh - Print - Export - Copy

Figure 2.1.4.2.1-2 - % of Work Orders by Program – Table

3. From the top-level 'Table' and 'Bar Graph' views, the widget will drill down to a second-level widget: [% of Work Orders by Type](#).
4. From the top-level table and 'Bar Graph' views, the widget will drill down to one of two case lists. The conditions are as follows:
 - a. Values under metrics % of Work Orders Closed will drill down to: [Work Order Status: Completed - Case List](#).
 - b. Values under metrics % of Work Orders Open will drill down to: [Work Order Status: Not Completed - Case List](#).
 - c. See [General OBIEE Function Mockup: Drill Links](#) for more details about case lists.

2.1.4.2.7 % of Work Orders by Type

Widget shall display the percentage of total Work Orders which were closed on time, closed late, open on time and open late by 'Type' during the prompted month(s).

1. This second-level 'Bar Graph' shall be available from the top-level [% of Work Order by Program](#) widget.
2. The widget shall toggle between 'Bar Graph' and 'Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Table' will be the second option.
 - b. The 'Bar Graph' shall display all 'Types' associated with the top-level widget.
 - c. The 'Bar Graph' shall display all 'Types' for the following metrics:
 - i. % of Work Orders Closed
 - ii. % of Work Orders Open
3. The report will calculate the percentage for all months for each 'Type' and metric when filtered for multiple months.

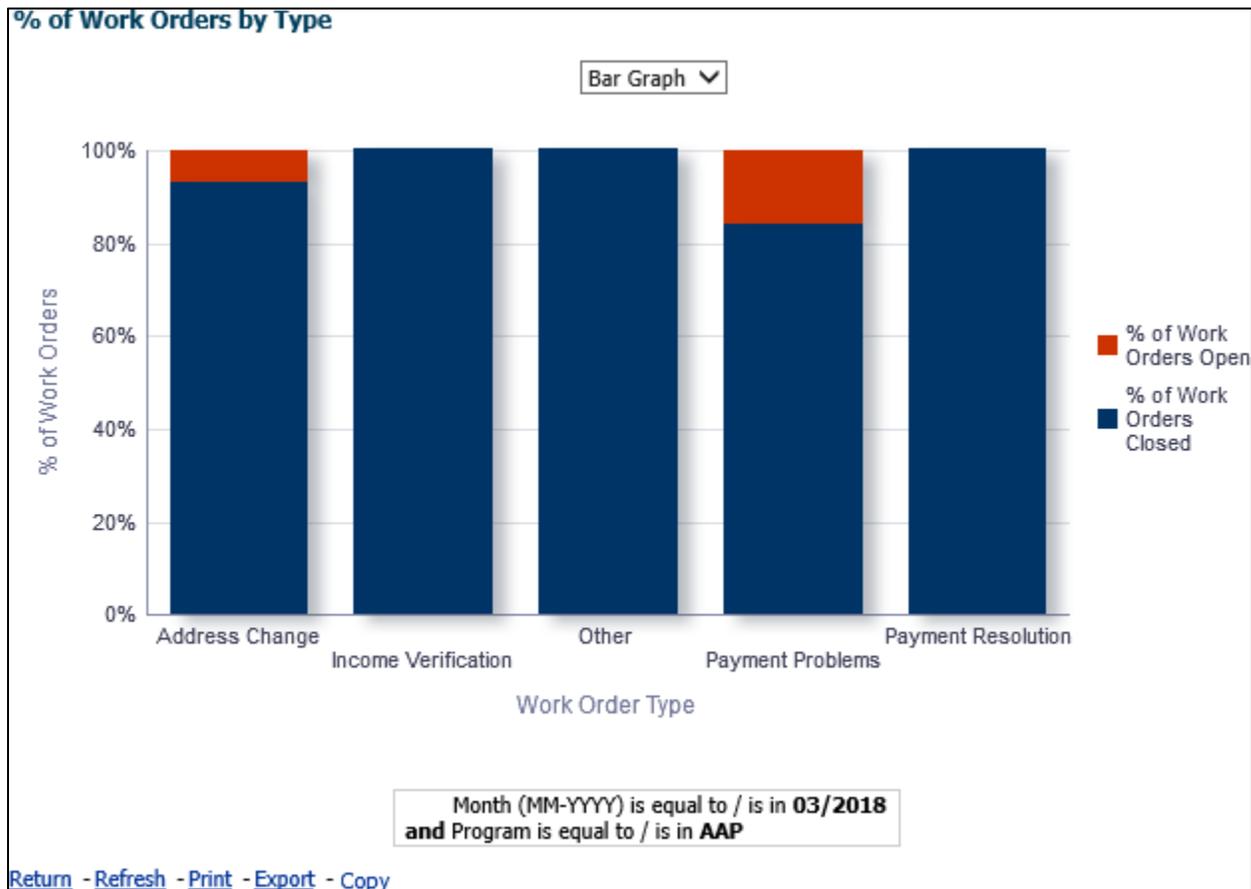


Figure 2.1.4.2.7-1 - % of Work Orders by Type – Bar Graph

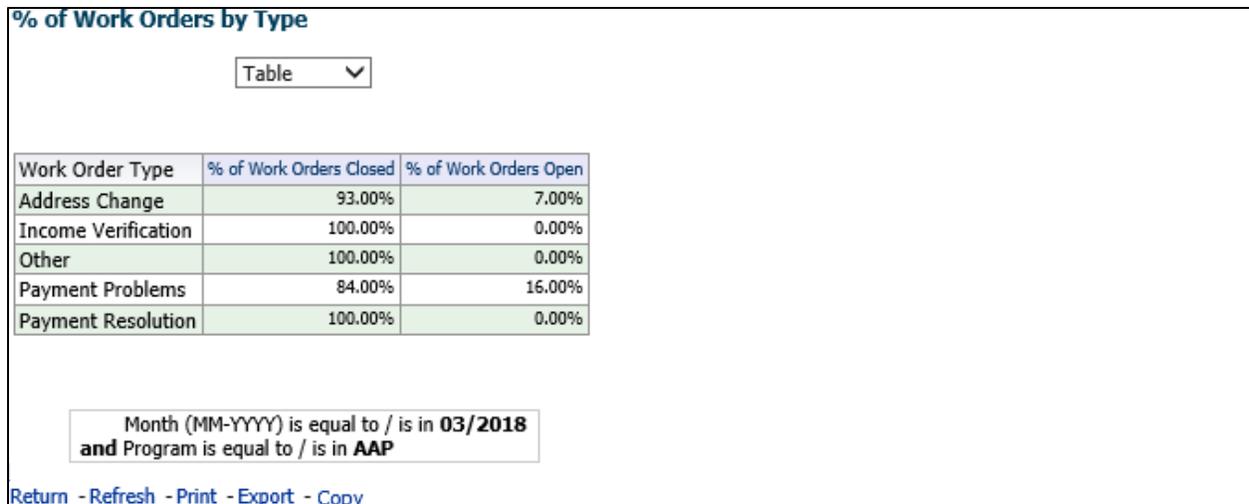


Figure 2.1.4.2.7-2 - % of Work Orders by Type – Table

4. From the second-level 'Table' and 'Bar Graph' views, the widget will drill down to two third-level graphs: [% of Work Orders Open by Sub Type](#) and [% of Work Orders Closed by Sub Type](#).
5. From the second-level 'Table' and 'Bar Graph' views, the widget will drill down to one of two case lists. The conditions are as follows:
 - a. Values under metrics % of Work Orders Closed will drill down to: [Work Order Status: Completed - Case List](#).
 - b. Values under metrics % of Work Orders Open will drill down to: [Work Order Status: Not Completed - Case List](#).
 - c. See [General OBIEE Function Mockup: Drill Links](#) for more details about case lists.

2.1.4.2.8 % of Work Orders Open by Sub Type

Widget shall display the percentage of total Work Orders which were open on time and open late by 'Sub Type' during the prompted month(s).

1. The widget will be the third-level 'Bar Graph' option from [% of Work Orders by Type](#)
2. The widget shall toggle between 'Bar Graph' and 'Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Table' will be the second option.
 - b. The 'Bar Graph' shall display all 'Sub Types' associated with the top-level 'Type'.
3. The report will calculate the percentage for all months for each 'Sub Type' and metric when filtered for multiple months.

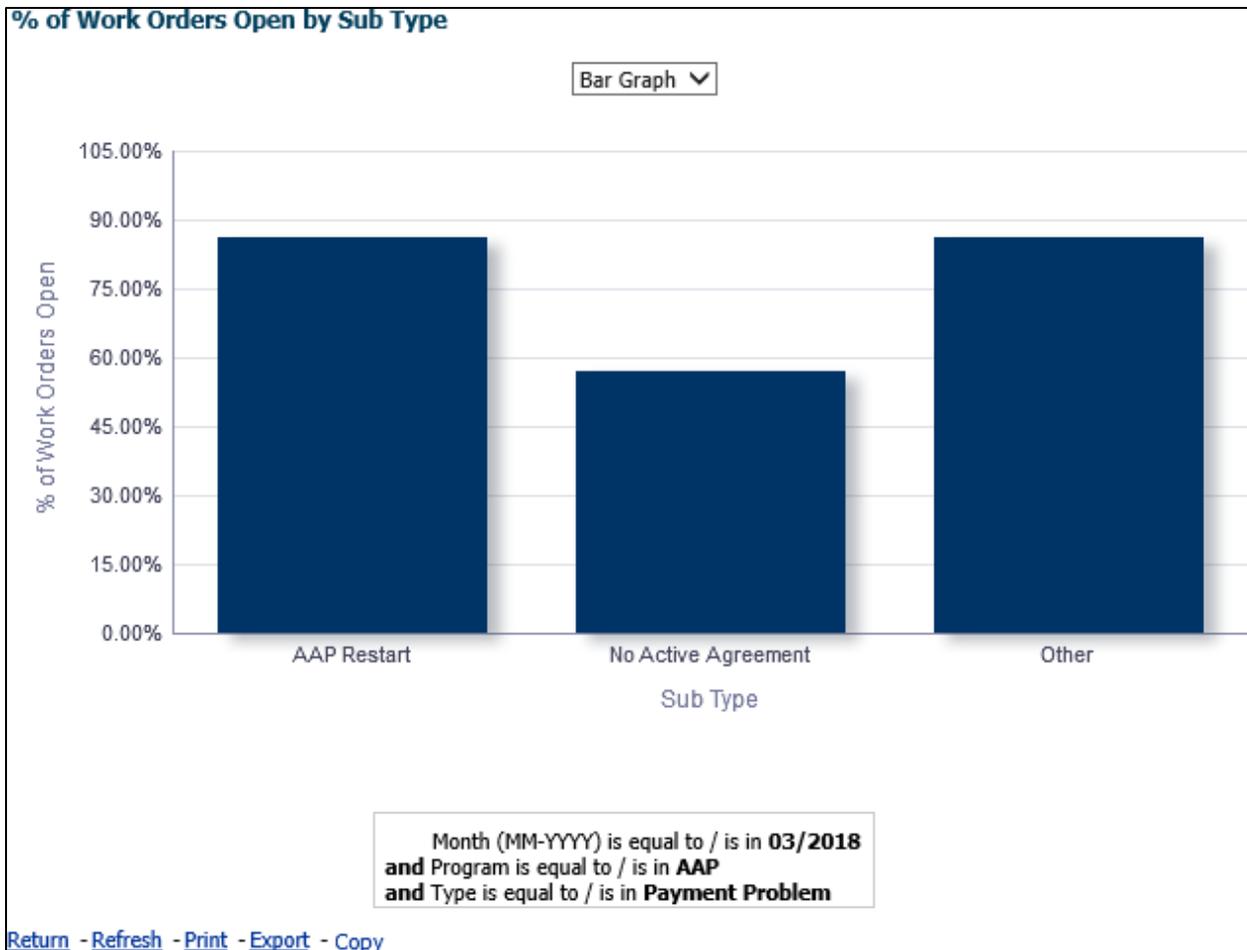


Figure 2.1.4.2.8-1 - % of Work Orders Open by Sub Type – Bar Graph

% of Work Orders Open by Sub Type

Table

Sub Type	% of Work Orders Open
AAP Restart	86.00%
No Active Agreement	57.00%
Other	86.00%

Month (MM-YYYY) is equal to / is in **03/2018**
 and Program is equal to / is in **AAP**
 and Type is equal to / is in **Payment Problem**

[Return](#) - [Refresh](#) - [Print](#) - [Export](#) - [Copy](#)

Figure 2.1.4.2.8-2 - % of Work Orders Open by Sub Type – Table

4. From the third-level 'Table' and 'Bar Graph' views, the widget will drill down to a fourth-level case list: [Work Order Status: Not Completed - Case List](#).
 - a. See [General OBIEE Function Mockup: Drill Links](#) for more details.

2.1.4.2.9 % of Work Orders Closed by Sub Type

Widget shall display the percentage of total Work Orders which were closed on time and closed late by 'Sub Type' during the prompted month(s).

1. The widget will be the third-level 'Bar Graph' option from [% of Work Orders by Type](#).
2. The widget shall toggle between 'Bar Graph' and 'Table'.
 - a. The 'Bar Graph' shall be the first view to load by default and 'Table' will be the second option.
 - b. The 'Bar Graph' shall display all 'Sub Types' associated with the top-level 'Type'.
3. The report will calculate the percentage for all months for each 'Sub Type' and metric when filtered for multiple months.

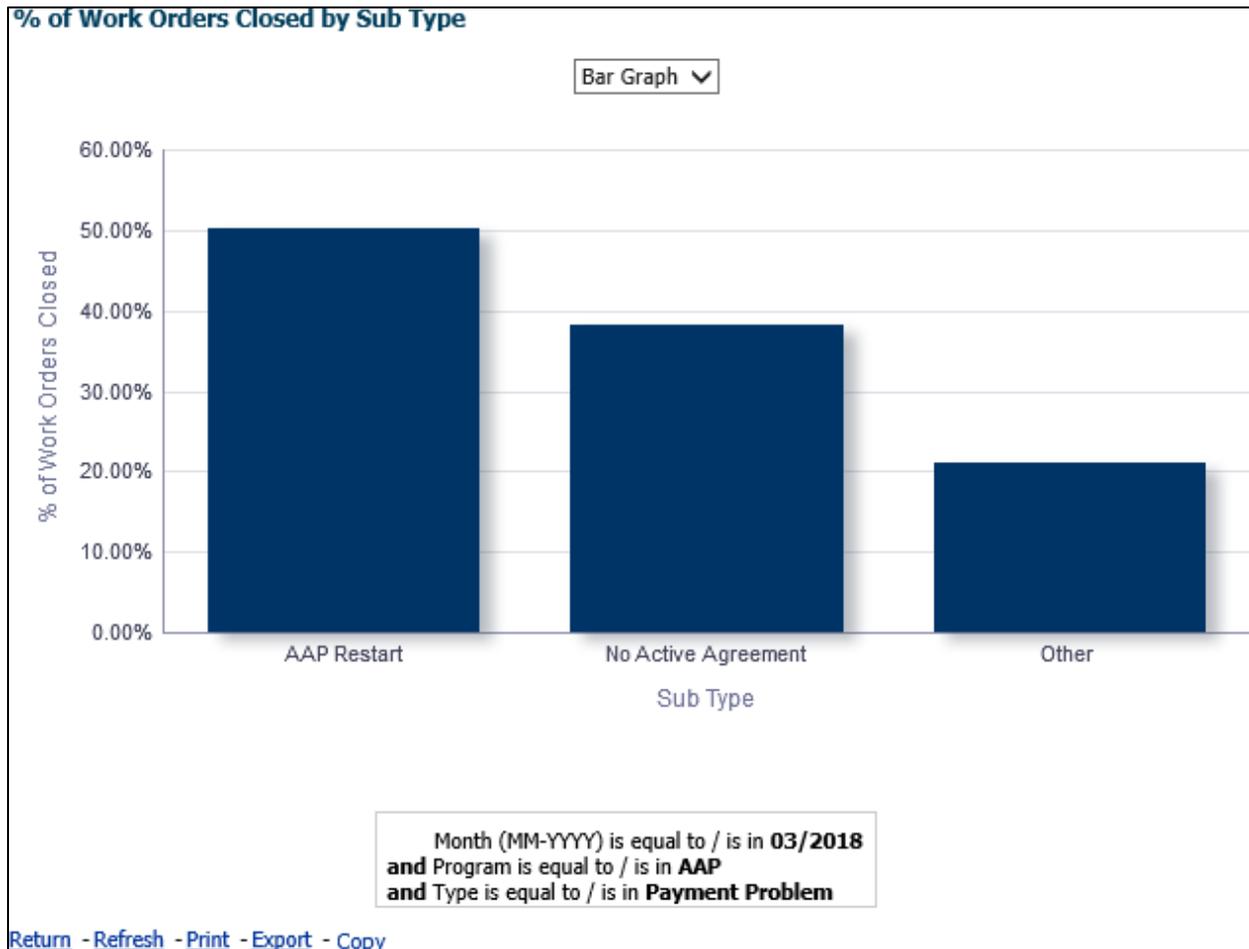


Figure 2.1.4.2.7-1 - % of Work Orders Closed by Sub Type – Bar Graph

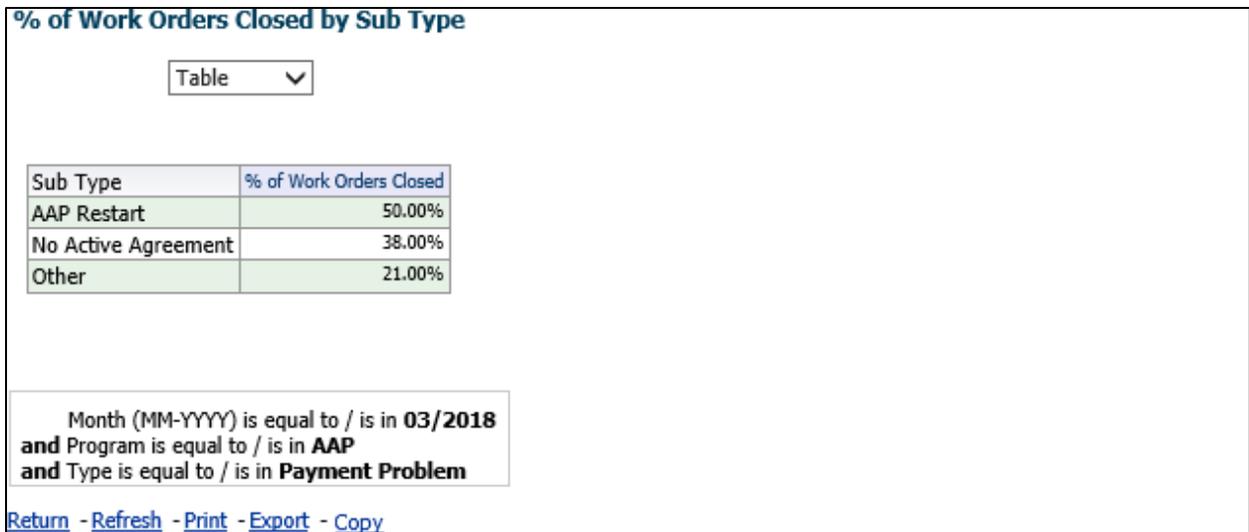


Figure 2.1.4.2.9-2 - % of Work Orders Closed by Sub Type – Table

4. From the third-level 'Table' and 'Bar Graph' views, the widget will drill down to a fourth-level case list: [Work Order Status: Completed - Case List](#).
 - a. See [General OBIEE Function Mockup: Drill Links](#) for more details.

2.1.4.2.10 # of Work Orders Without Case Number

Widget shall display the total number of Work Orders which are not associated to a case during the prompted month(s). Widget will primarily focus on: Work Orders with only CPS, and no Program, All Work Orders with Programs, and Work Orders with neither Program nor CPS.

1. The widget shall display all Work Orders with CPS program which do not have a case.
2. The report will sum the values for all months for each of the metrics when filtered for multiple months.

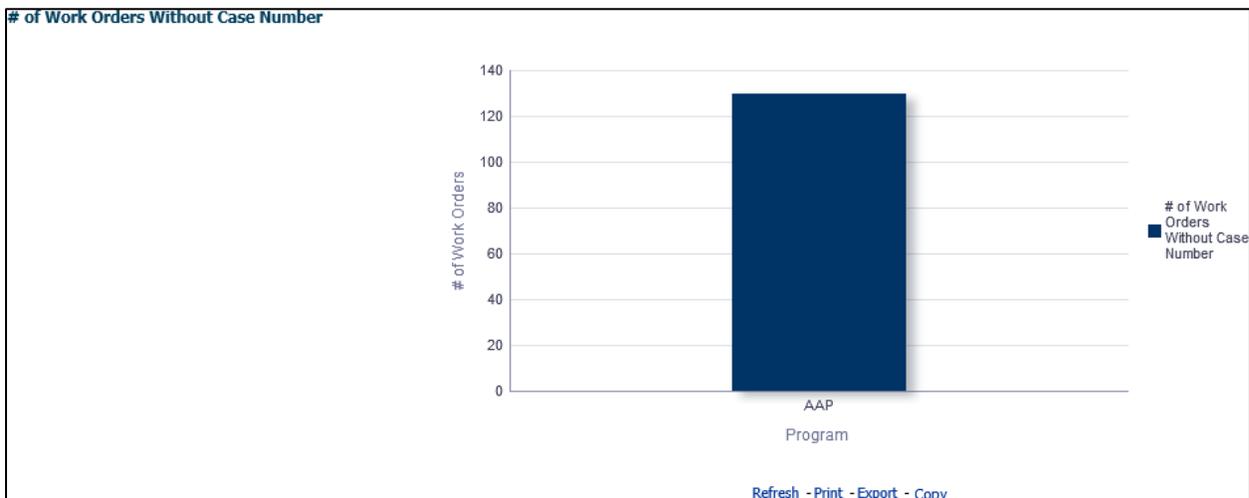


Figure 2.1.4.2.10 - # of Work Orders Without Case Number – Bar Graph

3. The widget will drill down to a case list: [Work Orders Without Case Number - Case List](#).
 - a. See [General OBIEE Function Mockup: Drill Links](#) for more details.

2.1.5 Work Order Status Summary Dashboard Page Layout

Work Order Status Summary

Data extracted as of March 3rd, 2018 11:06 PM

* Month: 03/2018 Program: --Select Value-- Type: --Select Value-- Sub Type: --Select Value-- Status: Closed Open Director Name: --Select Value--

Office: --Select Value-- Deputy Name: --Select Value-- Unit: --Select Value-- Supervisor Name: --Select Value-- Assigned Worker ID: --Select Value--

Apply Reset

* - Indicates required fields

Work Order Status Summary Report

Program	Type	Sub Type	01/2018				02/2018				03/2018						
			# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late			
AAP	Address Change	Address Change/Correction	2	0	0	1	3	4	5	0	4	13	12	1	0	1	14
	Income Verification	Verify AAP Payment	8	2	0	0	10	4	1	0	4	9	18	2	0	0	20
	Other	Open Test Box	7	0	0	0	7	4	1	0	4	5	17	0	0	0	17
	Payment Problem	JAP Restart	5	0	0	1	6	4	1	0	4	9	5	0	0	1	6
		No Active Agreement	4	0	0	1	5	4	1	0	4	9	4	0	0	1	5
		Other	6	1	1	1	9	4	1	0	4	9	6	1	0	1	8
	Payment Resolution	PAS Age Rate Increase	2	1	1	0	4	8	1	0	0	9	22	1	0	0	23
AAP Total			34	4	2	4	44	32	11	0	24	60	84	5	0	4	93
Rin-GAP	Address Change	Address Change	0	1	0	0	1	0	0	0	0	0	50	1	1	0	52
	Payment Problem	No Payment Rate	2	2	2	1	7	0	1	0	1	2	22	2	2	1	27
	Other	Affidavit	4	2	2	1	11	4	1	0	3	8	1	2	1	2	16
	Emergency	Infant (0-2 years)	4	0	0	0	4	0	0	0	6	6	44	3	0	0	47
Rin-GAP Total			10	5	4	4	31	4	4	0	12	20	258	7	6	4	275
Medi-Cal	CCC	Approval	7	3	1	0	7	2	3	0	7	12	53	3	1	0	57
	Transitional	Other	4	1	1	0	6	2	2	0	2	6	14	1	2	0	17
Medi-Cal Total			11	4	2	0	13	4	5	0	9	18	67	4	3	0	74
Grand Total			55	13	6	8	88	40	20	0	45	100	409	16	9	8	442

Refresh Print Export Copy

of Work Orders by Month

Refresh Print Export Copy

2.1.5.1 Prompt Detail

* Month: 03/2018 Program: --Select Value-- Type: --Select Value-- Sub Type: --Select Value-- Status: Closed Open Director Name: --Select Value--

Office: --Select Value-- Deputy Name: --Select Value-- Unit: --Select Value-- Supervisor Name: --Select Value-- Assigned Worker ID: --Select Value--

Apply Reset

Table 5 – Prompt Description

Filter Name	Default Value	Filter Type
*Month	Current Month	Single-select option to filter data by the month. The data will display as of the day a user is viewing the dashboard.
Program	All	Multi-select option to filter data by Work Order 'Programs'. See Work Order Programs, Types and Sub Types in the Appendix for full list.
Type	All	Multi-select option to filter data by Work Order 'Types'. See Work Order Programs, Types and Sub Types in the Appendix for full list.

Filter Name	Default Value	Filter Type
Sub Type	All	Multi-select option to filter data by Work Order 'Sub Types'. See Work Order Programs, Types and Sub Types in the Appendix for full list.
Status	Unchecked	Check box option to filter the results for ' Closed ' Work Orders and/or ' Open ' Work Orders. Note: If both options are unchecked, then the page will display all results.
Director Name	All	Multi-select option to filter data by Director.
Office	All	Multi-select option to filter data by Office name.
Deputy Name	All	Multi-select option to filter data by Deputy.
Unit	All	Multi-select option to filter data by Unit.
Supervisor Name	All	Multi-select option to filter data by Supervisor.
Assigned Worker ID	All	Multi-select option to filter data by Worker number assigned to the work order.

Table 6 - Logic for parameters will be as follows:

Dashboard Page	Parameters Addition	Parameter Description
Work Order Status	Add "Month" dropdown prompt.	This is a mandatory field which displays the month as of the day the dashboard is viewed. At least one month must be selected to filter the dashboard. The values will be in MM/YYYY format.
	Add "Program" dropdown after "Month".	The values will be all 'Programs' associated to Work Orders.
	Add "Type" dropdown after "Program".	The values will be all 'Types' associated to Work Orders. The dropdown values will change dynamically depending on the 'Program'.
	Add "Sub Type" dropdown after "Type".	The values will be all 'Sub Types' of Work Orders. The dropdown values will change dynamically depending on the 'Type'.

Dashboard Page	Parameters Addition	Parameter Description
	Add "Status" check boxes after "Sub Type".	The values will be: - Closed - Open
	Add "Director Name" dropdown after "Status".	The values will be limited to the person who supervises one or more Deputies in one or more Offices.
	Add "Office" dropdown after "Director".	The values will be limited to those in the user's County.
	Add "Deputy Name" dropdown after "Office".	The values will be limited to the person who supervises one or more Eligibility Unit Supervisors in one or more Offices.
	Add "Unit" dropdown after "Deputy".	The values will be limited to those in the user's County. The dropdown values will change dynamically depending on the 'Office'.
	Add "Supervisor Name" dropdown after "Office".	The values will be limited to the person who supervises the worker assigned to a work order. The dropdown values will change dynamically depending on the 'Unit'.
	Add "Assigned Worker ID" dropdown after "Unit".	The values will be workers assigned to a work order. The values will be limited to the those in the user's County. The dropdown values will change dynamically depending on the 'Unit' depending on the available in the data set.

Note: * indicates that the filter 'Month' is always required.

2.1.5.2 Widget Detail

2.1.5.2.1 Work Order Status Summary Report

Widget shall display all totals of Work Orders open and closed. This widget will break down the Work Orders by 'Program', 'Type' and 'Sub Type'.

1. The widget will be the top-level 'Pivot Table'.
 - a. The table will consist of the following metrics:

- i. # of Work Orders Closed On Time
 - ii. # of Work Orders Closed Late
 - iii. # of Work Orders Open On Time
 - iv. # of Work Orders Open Late
- b. The 'Pivot Table' will section off each 'Program'.
- i. Each 'Program' will display the associated 'Type' and 'Sub Type'.
- c. The 'Pivot Table' view shall display the subtotal of all Work Orders for each 'Sub Type'.
- d. A total will tally up the number of Work Orders for each 'Program'.
- e. The 'Pivot Table' shall also display a grand total of Work Orders by status.
- f. A grand total will sum the number of Work Orders.
2. Widget shall display data for three months.
- a. The three months will include the prompted month and the two previous months.
 - b. The table will consist of the following metrics for each prompted month:
 - i. # of Work Orders Closed On Time
 - ii. # of Work Orders Closed Late
 - iii. # of Work Orders Open On Time
 - iv. # of Work Orders Open Late
 - c. The 'Pivot Table' will section off each 'Program' for each month.
 - i. Each 'Program' will display the associated 'Type' and 'Sub Type'.
 - d. The 'Pivot Table' view shall display the subtotal of all Work Orders for each 'Sub Type' for each month.
 - e. A total will tally up the number of Work Orders for each 'Program' for each month.
 - f. The 'Pivot Table' shall also display a grand total of Work Orders by status for each month.
 - g. A grand total will sum the number of Work Orders for each month.

Work Order Status Summary Report																	
Program	Type	Sub Type	01/2018					02/2018					03/2018				
			# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	Sub Total	# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	Sub Total	# of Work Orders Closed On Time	# of Work Orders Closed Late	# of Work Orders Open On Time	# of Work Orders Open Late	Sub Total
AAP	Address Change	Address Change/Correction	2	0	0	1	2	4	5	0	4	13	12	1	0	1	14
	Income Verification	Verify AAP Payment	8	2	0	0	10	4	3	0	4	9	18	2	0	0	20
	Other	Open Text Box	7	0	0	0	7	4	1	0	4	9	17	0	0	0	17
	Payment Problem	AAP Restart	5	0	0	1	4	4	1	0	4	9	5	0	0	0	5
		No Active Agreement	4	0	0	1	5	4	1	0	4	9	4	0	0	0	4
		Other	6	1	1	1	9	6	1	0	4	9	6	1	0	0	7
	Payment Problem	PAS Age Rate Increase	2	1	1	0	4	8	1	0	0	9	12	1	0	0	13
AAP Total			34	4	2	4	44	32	11	0	24	68	84	5	0	4	93
Kin-GAP	Address Change	Address Change	0	1	0	0	1	0	0	0	0	0	0	1	1	0	2
	Payment Problem	No Payment	2	2	2	1	7	0	1	0	1	2	2	2	2	1	7
		Rate	6	0	0	2	8	0	2	0	2	4	6	0	1	2	9
		Affiliate	6	2	2	1	11	4	1	0	5	8	4	1	2	1	10
		Emergency	4	0	0	0	4	0	0	0	0	0	4	0	0	0	4
Kin-GAP Total			18	5	4	4	33	4	4	0	13	20	7	6	4	27	43
Medi-Cal	CEC	Approval	3	3	1	0	7	2	3	0	7	12	5	3	1	0	17
	Transitional	Other	4	1	1	0	6	2	0	0	2	4	3	1	2	0	13
Medi-Cal Total			7	4	2	0	13	4	3	0	9	18	8	4	3	0	24
Grand Total			59	13	8	8	88	40	20	0	45	105	109	16	9	8	144

Figure 2.1.5.2.1 – Work Order Status Report

3. From the 'Pivot Table', the widget will drill down to two case lists: [Work Order Status: Completed - Case List](#) and [Work Order Status: Not Completed - Case List](#) from all values which are closed and open respectively.
- a. See [General OBIEE Function Mockup: Drill Links](#) for more details.

2.1.5.2.2 Work Orders by Month

Widget shall display sum of Work Orders as of the prompted month.

- 1. The widget shall toggle between 'Bar Graph' and 'Pivot Table'

- a. 'Bar Graph' view shall be the first to load by default and 'Pivot Table' view will be the second option.
 - b. The 'Bar Graph' shall display all Work Orders following metric:
 - i. # of Work Orders
 - c. The 'Pivot Table' shall also display a grand total of Work Orders.
2. Widget shall display data for up to three months
- a. The three months will include the prompted month and the two previous months.

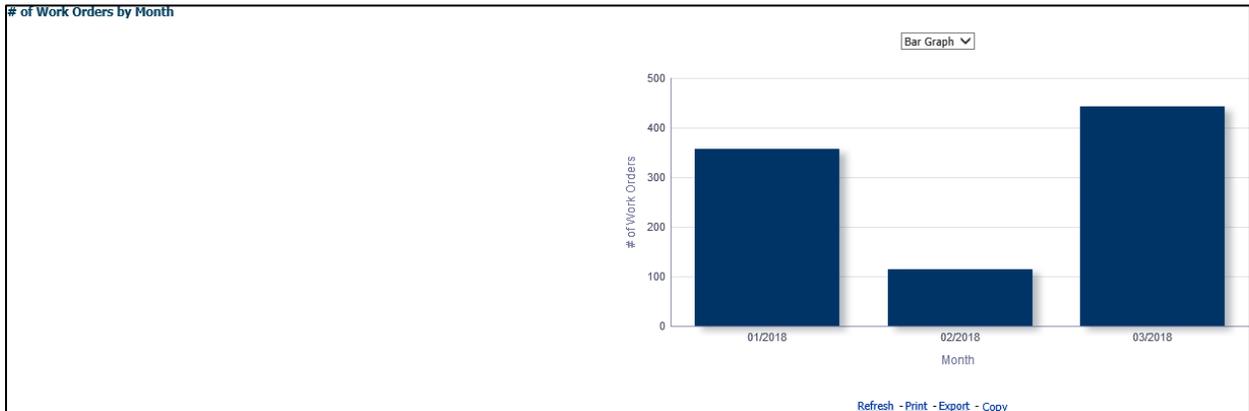


Figure 2.1.5.2.2-1 - # of Work Order by Month – Bar Graph

Month	# of Work Orders
01/2018	356
02/2018	115
03/2018	442
Grand Total	115

Figure 2.1.5.2.2-2 – # of Work Order by Month – Table

- 3. From the top-level 'Pivot Table' and 'Bar Graph' views, the widget will have the option to drill down to one of two case lists. The condition is as follows:
 - a. Values under metrics # of Work Orders will drill down to: [Work Orders by Month - Case List](#).

2.1.6 Case List

Where applicable, widgets will link to each of these case lists.

2.1.6.1 Work Order Case Summary: Completed – Case List

Table 5 - The logic of the Work Order Case Summary: Completed – Case List will be as follows:

Work Order Status	
Case List	Addition
Work Order Case Summary: Completed – Case List	1. Add “Work Order Number” – Number assigned to a Work Order.

Work Order Status	
Case List	Addition
	<p>2. Add "Case Number" – Case number associated to a Work Order.</p> <p>3. Add "Program" – The 'Program' associated to the Work Order. (Category ID = 18)</p> <p>4. Add "Type" – The 'Type' associated to the Work Order. (Category ID = 10436)</p> <p>5. Add "Sub Type" – The 'Sub Type' associated to the Work Order. (Category ID = 10437)</p> <p>6. Add "Director Name" – First and Last name of the HSA III who supervises the deputies who work with multiple 'Programs'. (Category ID = 10183)</p> <p>Note: See Appendix: Position for more information.</p> <p>7. Add "Office" – Offices within the user's County.</p> <p>8. Add "Deputy Name" – First and Last name of the HSA I who work with multiple 'Programs'. (Category ID = 10183)</p> <p>Note: See Appendix: Position for more information.</p> <p>9. Add "Unit" – Units within the user's Office.</p> <p>10. Add "Supervisor Name" – Supervisor of the Unit within the user's Office. This is the supervisor of the Assigned Worker.</p> <p>11. Add "Assigned Worker ID" – The worker who is assigned to a work order. This assigned worker information is available in the Work Order Detail page.</p> <p>12. Add "Assigned Worker Name" – First and last name of the worker who is assigned to a Work Order. This assigned worker information is available in the Work Order Detail page.</p>

Work Order Status	
Case List	Addition
	<p>13. Add "Due Date" – The date when the Work Order must be completed by.</p> <p>Note: See Appendix: Dates for date definitions.</p> <p>14. Add "Create Date" – Date when the Work Order was created. The date will be in MM/DD/YYYY format.</p> <p>Note: See Appendix: Dates for date definitions.</p> <p>15. Add "Status" – Indicates if a Work Order is closed late or closed on time.</p> <p>16. Add "Number of Days Late" – Number of days it took for a Work Order to be closed, past the due date.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. Refer to the appendix for a complete list of the See Work Order Programs, Types and Sub Types in the Appendix for full list and refer to Calculations for the equation. 2. This number must be calculated with the Assumption that Create Date is day 0 and weekend and County Holidays are not counted. <p>17. Add "Number of Days to Complete" – Number of days it took for a Work Order to be closed.</p> <p>Note:</p> <ol style="list-style-type: none"> 1. When a Work Order switches from open to closed, the Work Order will move from the Work Order Case Summary: Not Completed – Case List to the Work Order Case Summary:

Work Order Status	
Case List	Addition
	<p>Completed – Case List and the days to complete shall be calculated accordingly.</p> <ol style="list-style-type: none"> 2. Refer to the appendix for a complete list of the See Work Order Programs, Types and Sub Types in the Appendix for full list and refer to Calculations for the equation. 3. This number must be calculated with the Assumption that Create Date is day 0 and weekend and County Holidays are not counted.

DRAFT

The following mock-up screen shots do not display real data.

Work Order Status Summary: Completed – Case List																
Work Order Number	Case Number	Program	Type	Sub Type	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	Due Date	Create Date	Status	Number of Days Late	Number of Days to Complete
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Closed On Time	0	5	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Closed On Time	0	5	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5	
XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Closed On Time	0	5	

Month (MM-YYYY) is equal to / is in 03/2018
and Program is equal to / is in AAP
and Type is equal to / is in Payment Problem
and Type is equal to / is in AAP Restart

Return - Refresh - Print - Export - Copy

Figure 2.1.6.1 – Work Order Status: Completed – Case List

2.1.6.2 Work Order Case Summary: Not Completed – Case List

Table 6 - The logic of the Work Order Case Summary: Not Completed – Case List will be as follows:

Work Order Status	
Case List	Addition
Work Order Case Summary: Not Completed – Case List	<ol style="list-style-type: none"> 1. Add “Work Order Number” – Number assigned to a Work Order. 2. Add “Case Number” – Case number associated to a Work Order.

Work Order Status	
Case List	Addition
<p>Note: Once a Work Order is closed, it will drop off this case list and appear in the 'Completed' case list</p>	<ol style="list-style-type: none"> 3. Add "Program" – The 'Program' associated to the Work Order. (Category ID = 18) 4. Add "Type" – The 'Type' associated to the Work Order. (Category ID = 10436) 5. Add "Sub Type" – The 'Sub Type' associated to the Work Order. (Category ID = 10437) 6. Add "Director" – First and Last name of the HSA III who supervises the deputies who work with multiple 'Programs'. (Category ID = 10183) <p>Note: See Appendix: Position for more information.</p> <ol style="list-style-type: none"> 7. Add "Office" – Offices within the user's County. 8. Add "Deputy" – First and Last name of the HSA I who work with multiple 'Programs'. (Category ID = 10183) <p>Note: See Appendix: Position for more information.</p> <ol style="list-style-type: none"> 9. Add "Unit" – Units within the user's Office. 10. Add "Supervisor Name" – Supervisor of the Unit within the user's Office. This is the Supervisor of the Assigned Worker. 11. Add "Assigned Worker ID" – The worker who is assigned to a work order. This assigned worker information is available in the Work Order Detail page. 12. Add "Assigned Worker Name" – First and last name of the worker who is assigned to a Work Order. This assigned worker information is available in the Work Order Detail page. 13. Add "Create Date" – Date when the Work Order was created. The date will be in MM/DD/YYYY format.

Work Order Status	
Case List	Addition
	<p>Note: See Appendix: Dates for date definitions.</p> <p>14. Add "Due Date" – The date when the Work Order must be completed by.</p> <p>Note: See Appendix: Dates for date definitions.</p> <p>15. Add "Status" – Indicates if a Work Order is open late or open on time.</p> <p>16. Add "Number of Days Late" – Number of days it took for a Work Order to be closed, past the due date. Refer to the appendix for a complete list of the See Work Order Programs, Types and Sub Types in the Appendix for full list and refer to Calculations for the equation. This number must be calculated with the Assumption that Create Date is day 0 and weekend and County Holidays are not counted.</p>

D R A F T

The following mock-up screen shots do not display real data.

Work Order Status Summary: Not Completed - Case List

Work Order Number	Case Number	Program	Type	Sub Type	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	Due Date	Create Date	Status	Number of Days Late
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Open On Time	0
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time	0
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time	0
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Open On Time	0
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time	0
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late	6
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time	0
Work Order Number	XXXXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Open On Time	0

Month (MM-YYYY) is equal to / is in 03/2018
 and Program is equal to / is in AAP
 and Type is equal to / is in Payment Problem
 and Sub Type is equal to / is in AAP Restart

Return - Refresh - Print - Export - Copy

Figure 2.1.6.2 – Work Order Status: Not Completed – Case List

2.1.6.3 Work Orders Without Case Number - Case List

Table 7 - The logic of the Work Orders Without Case Number - Case List will be as follows:

Work Order Status	
Case List	Addition
<p>Work Orders Without Case Number - Case List</p> <p>Note: Once a Case Number is associated, the Work Order will drop off this case list and appear in either the 'Completed' or 'Not Completed' case list, depending on the 'Status'</p>	<ol style="list-style-type: none"> 1. Add "Work Order Number" – Number assigned to a Work Order. 2. Add "CWS/CMS Case Number" – The Child Welfare Services / Case Management System case number added when a Work Order is created. 3. Add "Program" – The 'Program' associated to the Work Order. (Category ID = 18) 4. Add "Type" – The 'Type' associated to the Work Order. (Category ID = 10436) 5. Add "Sub Type" – The 'Sub Type' associated to the Work Order. (Category ID = 10437) 6. Add "Director Name" – First and Last name of the Director who supervises the deputies who work with multiple 'Programs'. (Category ID = 10183) <p>Note: See Appendix: Position for more information.</p> <ol style="list-style-type: none"> 7. Add "Office" – Offices within the user's County. 8. Add "Deputy Name" – First and Last name of the Deputy who work with multiple 'Programs'. (Category ID = 10183) <p>Note: See Appendix: Position for more information.</p> <ol style="list-style-type: none"> 9. Add "Unit" – Units within the user's Office. 10. Add "Supervisor Name" – Supervisor of the Unit within the user's Office. This is the Supervisor of the Assigned Worker. 11. Add "Assigned Worker ID" – The worker who is assigned to a work order. This assigned worker

Work Order Status	
Case List	Addition
	<p>information is available in the Work Order Detail page.</p> <p>12. Add "Assigned Worker Name" – First and last name of the worker who is assigned to a Work Order. This assigned worker information is available in the Work Order Detail page.</p> <p>13. Add "Create Date" – Date when the Work Order was created. The date will be in MM/DD/YYYY format.</p> <p>Note: See Appendix: Dates for date definitions.</p> <p>14. Add "Due Date" – The date when the Work Order must be completed by.</p> <p>Note: See Appendix: Dates for date definitions.</p> <p>15. Add "Status" – Indicates if a Work Order is open or closed.</p>

The following mock-up screen shots do not display real data.

Work Orders Without Case Number - Case List														
Work Order Number	CWS/CMS Case Number	Program	Type	Sub Type	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	Due Date	Create Date	Status
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open Late
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Open On Time
Work Order Number	CWS/CMS Case Number	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Open On Time

Month (MM-YYYY) is equal to / is in 03/2018

Return - Refresh - Print - Export - Copy

Figure 2.1.6.3 – Work Orders Without Case Number – Case List

2.1.6.4 Work Orders by Month – Case List

Table 8 - The logic of the Work Orders by Month - Case List will be as follows:

Work Order Status	
Case List	Addition
<p>Work Order Case Summary: Completed – Case List</p>	<ol style="list-style-type: none"> 1. Add “Work Order Number” – Number assigned to a Work Order. 2. Add “Case Number” – Case number associated to a Work Order. 3. Add “Program” – The ‘Program’ associated to the Work Order. (Category ID = 18) 4. Add “Type” – The ‘Type’ associated to the Work Order. (Category ID = 10436) 5. Add “Sub Type” – The ‘Sub Type’ associated to the Work Order. (Category ID = 10437) 6. Add “Creating Worker ID” – The worker who created a work order. This creating worker information is available in the Work Order Detail page. 7. Add “Creating Worker Name” – First and last name of the worker who created a Work Order. This creating worker information is available in the Work Order Detail page. 8. Add “Assigned Worker ID” – The worker who is assigned to a work order. This assigned worker information is available in the Work Order Detail page. 9. Add “Assigned Worker Name” – First and last name of the worker who is assigned to a Work Order. This assigned worker information is available in the Work Order Detail page. 10. Add “Due Date” – The date when the Work Order must be completed by. <p>Note: See Appendix: Dates for date definitions.</p> <ol style="list-style-type: none"> 11. Add “Create Date” – Date when the Work Order was created. The date will be in MM/DD/YYYY format.

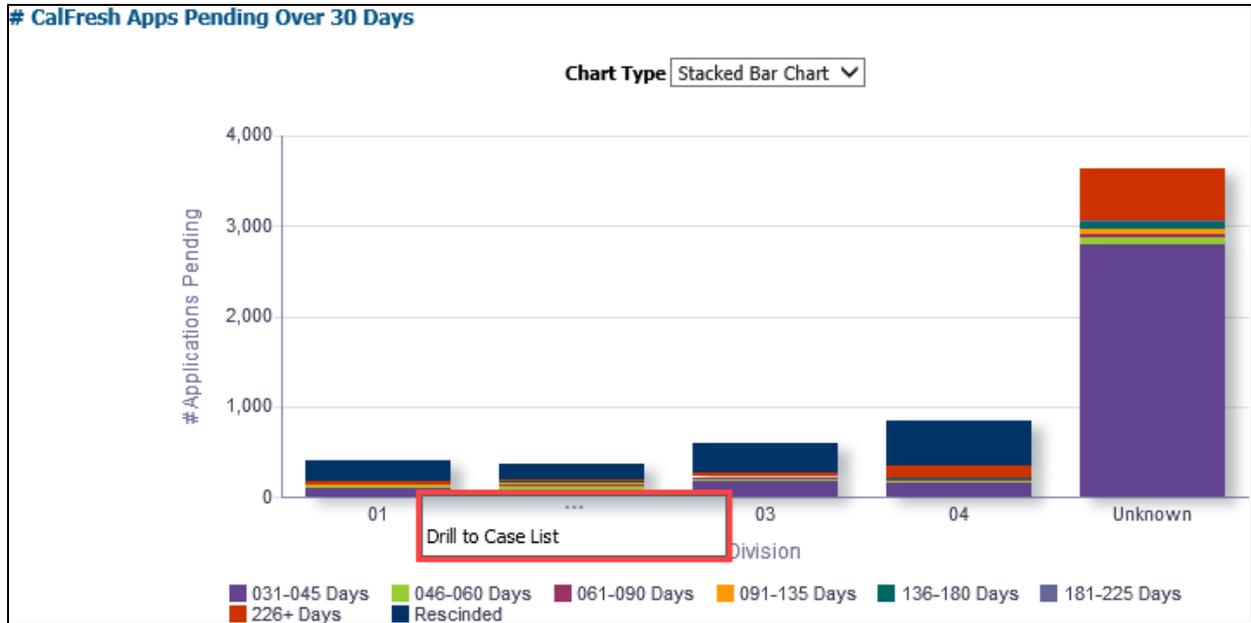


Figure 2.2.1-1 – Drill down link list

Note: This list of link(s) mockup is only an example and may be different in other widgets. See widget descriptions in section [2.1.6 Widget Details](#) for more details.

Case Number	Application Date	Case Name	CF Type	Division	Express Service Indicator	Language	Number of Days Pending
XXXXXX		Case Name	NACF	01	N	English	32
XX		Case Name	NACF	01	N	English	35
XXXXXXXX	May-10-2018	Case Name	NACF	01	N	English	33
XXXXXXXX	May-18-2018	Case Name	NACF	01	N	Spanish	31
XXXXXXXX	May-09-2018	Case Name	NACF	01	N	English	40
XXXXXXXX	May-18-2018	Case Name	PACF	01	N	Spanish	31

Figure 2.2.1-2- Case Number to CalACES South Summary page link

Work Order Status Summary: Completed - Case List

Work Order Number	Case Number	Program	Type	Sub Type	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	Due Date	Create Date	Status	Number of Days Late	Number of Days to Complete
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Closed On Time	0	5
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Closed On Time	0	5
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed Late	6	6
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	03/08/2018	03/01/2018	Closed On Time	0	5
Work Order Number	XXXXXX	AAP	Payment Problem	AAP Restart	Director Name	Office	Deputy Name	Unit	Supervisor Name	Assigned Worker ID	Assigned Worker Name	04/04/2018	03/28/2018	Closed On Time	0	5

Month (MM-YYYY) is equal to / is in 03/2018
and Program is equal to / is in AAP
and Type is equal to / is in Payment Problem
and Type is equal to / is in AAP Restart

Return - Refresh - Print - Export - Copy

Figure 2.2.1-3- Work Order Number to CalACES South Work Order Detail page link

2.3 Report Navigation

The Work Order Summary dashboard page can be found here:

Global Navigation: Reports

Local Navigation: Business Intelligence

Menu: Child Welfare Program STATS

Dashboard: Work Order Status

Dashboard Page: Work Order Status

Dashboard Description: The Work Order Status dashboard provides details on the Number of Work Orders opened and closed, as well as indicating which Work Orders were on time and which ones were late, in a given period. The report allows the ability to break down the data by 'Program', 'Type' and 'Sub Type' of Work Orders.

Execution Frequency: Nightly Batch

Child Welfare Programs STATS		
Table of Contents		
<p><u>Alerts</u></p> <p>MEDs Alerts</p> <p>MEDs Alerts Statistics</p> <p><u>Foster Care</u></p> <p>Intake Processing</p> <p>Intake Processing Timeliness</p> <p>Intakes Received</p> <p>Caseload Management</p> <p>Pending Intakes</p> <p>Renewals</p>	<p><u>Kin-GAP</u></p> <p>Intake Processing</p> <p>Intake Processing Timeliness</p> <p>Intakes Received</p> <p>Caseload Management</p> <p>Pending Intakes</p> <p>Renewals</p> <p><u>Medi-Cal</u></p> <p>Application Processing</p> <p>Application Processing Timeliness</p> <p>Applications Received</p> <p>Caseload Management</p> <p>Newly Approved Aided Person</p> <p>Pending Applications</p> <p>Re-Evaluation</p>	<p><u>AAP</u></p> <p>Intake Processing</p> <p>Intake Processing Timeliness</p> <p>Intakes Received</p> <p>Caseload Management</p> <p>Pending Intakes</p> <p>Renewals</p> <p><u>Work Order</u></p> <p>Work Order Status</p> <p>Work Orders Status Summary</p>

Figure 2.3 – Report Navigation

2.4 Report and Data Level Security

The Work Order Status dashboard page will only be visible to users who have the **CWS BI Consumer Role** security role associated to their security profile. The **CWS BI Consumer Role** security role will be tied to the security group called **CWS BI Consumer**. County Security Administrators will be responsible for providing the **CWS BI Consumer** security group to the appropriate users.

2.5 ETL Dependencies

A new load plan and batch jobs will be created. The batch job will kick off of the new load plan. It will only run after the previous batch job(s) completes successfully.

2.6 Dashboard Standards

Font: OBIEE default

Font Color: Black (#000000)

Font Size: 11pt

2.7 Dashboard Details

Please see [2.2 Report Navigation](#) for Work Order Status.

2.8 Data Volume/Usage/Performance

Large datasets and export files will affect the performance and download speed. In case of large volume of data, it is recommended that the user utilize filters to avoid long processing times or export the data as a .csv file.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security Matrix	Listing of all impacted or additional Security Groups and Roles for this SCR.	 CA 52237 - Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.4.2.20(a)(b)	<p>The LRS shall utilize industry standard packages and applications for the extraction and processing of LRS Data from the LRS databases, including:</p> <ul style="list-style-type: none"> • OBIEE • COUNTY data warehouse(s) using Oracle tools and processes 	Work Order dashboards exist in OBIEE

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
N/A	Not Applicable	Not Applicable

5 MIGRATION IMPACTS

Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A	Not Applicable	Not Applicable	Not Applicable	Not Applicable	Not Applicable

6 APPENDIX

6.1 Dates

Date	Description
Due Date	This date is automatically calculated by the application when a work order is saved based on the Created Date and the Program/Type/Sub-Type selections for the work order.
Create Date	This date is auto populated (without timestamp) upon initial save of the work order.
Completed Date	This date is auto populated in the application upon initial save of the work order, in "Completed" status.

6.2 Position

Position	Description
HSA I Name	The active worker number associated to the Assigned Worker's Office and Section, with type Deputy.
HSA III Name	The active worker number associated to the Assigned Worker's Office with type Director.

6.3 Calculations

Metric	Description
% of Work Orders Closed	<p>Program: Work Orders Closed by Program / Total Number of Work Orders by Program) * 100</p> <p>Type: Work Orders Closed by Type / Total Number of Work Orders by Type) * 100</p> <p>Sub Type: Work Orders Closed by Sub Type / Total Number of Work Orders Sub Type) * 100</p>
% of Work Orders Open	<p>Program: Work Orders Open by Program / Total Number of Work Orders by Program) * 100</p> <p>Type: Work Orders Open by Type / Total Number of Work Orders by Type) * 100</p> <p>Sub Type: Work Orders Open by Sub Type / Total Number of Work Orders Sub Type) * 100</p>
Number of Days Late	<p>Completed Date – Due Date</p> <p>See Appendix: Dates for date definitions.</p>

Metric	Description
Number of Days to Complete	Completed Date – Create Date See Appendix: Dates for date definitions.

6.4 Metrics

Metric Name	Example
Closed On Time	<p>Current Date = 10/31/2018</p> <p>Work Order #1 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Closed Create Date = 10/1/2018 Due Date = 10/8/2018 Complete Date = 10/4/2018</p> <p>Work Order #2 Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/2/2018</p> <p>Work Order #3 Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Closed</p>

Metric Name	Example
	<p>Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/4/2018</p> <p>Work Order #4 Program: Medi-Cal Type: Medi-Cal Sub Type: Disenrollment Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/3/2018</p> <p>Closed on Time = 4</p>
Closed Late	<p>Current Date = 10/31/2018</p> <p>Work Order #1 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Closed Create Date = 10/1/2018 Due Date = 10/8/2018 Complete Date = 10/16/2018</p> <p>Work Order #2 Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018</p>

Metric Name	Example
	<p>Complete Date = 10/10/2018</p> <p>Work Order #3 Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/18/2018</p> <p>Work Order #4 Program: Medi-Cal Type: Medi-Cal Sub Type: Disenrollment Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/12/2018</p> <p>Closed Late = 4</p>
Open On Time	<p>Current Date = 10/31/2018</p> <p>Work Order #1 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Open Create Date = 10/31/2018 Due Date = 11/7/2018 Complete Date = N/A</p>

Metric Name	Example
	<p>Work Order #2</p> <p>Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3 Status: Open Create Date = 10/26/2018 Due Date = 10/31/2018 Complete Date = N/A</p> <p>Work Order #3</p> <p>Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Open Create Date = 10/30/2018 Due Date = 11/02/2018 Complete Date = N/A</p> <p>Work Order #4</p> <p>Program: Medi-Cal Type: Medi-Cal Sub Type: Disenrollment Due Days Threshold: 3 Status: Open Create Date = 10/31/2018 Due Date = 11/05/2018 Complete Date = N/A</p> <p>Open on Time = 4</p>
Open Late	<p>Current Date = 10/31/2018</p> <p>Work Order #1</p> <p>Program: AAP</p>

Metric Name	Example
	<p>Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Open Create Date = 10/23/2018 Due Date = 10/30/2018 Complete Date = N/A</p> <p>Work Order #2 Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3 Status: Open Create Date = 10/24/2018 Due Date = 10/29/2018 Complete Date = N/A</p> <p>Work Order #3 Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Open Create Date = 10/22/2018 Due Date = 10/25/2018 Complete Date = N/A</p> <p>Work Order #4 Program: Medi-Cal Type: Medi-Cal Sub Type: Disenrollment Due Days Threshold: 3 Status: Open Create Date = 10/16/2018</p>

Metric Name	Example
	<p>Due Date = 10/19/2018 Complete Date = N/A</p> <p>Open Late = 4</p>
# of Work Orders Closed On Time	<p>Using the example for Closed on Time # of Work Orders Closed On Time =</p> <p>Program Level:</p> <ul style="list-style-type: none"> - 1 AAP - 3 Medi-Cal <p>Type Level:</p> <ul style="list-style-type: none"> - 1 Address Change - 3 Medi-Cal <p>Sub Type Level:</p> <ul style="list-style-type: none"> - 1 Address Change/Correction - 1 Aid Code - 1 BIC Request - 1 Disenrollment
# of Work Orders Closed Late	<p>Using the example for Closed Late # of Work Orders Closed On Time =</p> <p>Program Level:</p> <ul style="list-style-type: none"> - 1 AAP - 3 Medi-Cal <p>Type Level:</p> <ul style="list-style-type: none"> - 1 Address Change - 3 Medi-Cal <p>Sub Type Level:</p> <ul style="list-style-type: none"> - 1 Address Change/Correction - 1 Aid Code - 1 BIC Request - 1 Disenrollment
# of Work Orders Open On Time	<p>Using the example for Open on Time # of Work Orders Closed On Time =</p> <p>Program Level:</p> <ul style="list-style-type: none"> - 1 AAP - 3 Medi-Cal <p>Type Level:</p> <ul style="list-style-type: none"> - 1 Address Change

Metric Name	Example
	<ul style="list-style-type: none"> - 3 Medi-Cal Sub Type Level: <ul style="list-style-type: none"> - 1 Address Change/Correction - 1 Aid Code - 1 BIC Request - 1 Disenrollment
# of Work Orders Open Late	Using the example for Open Late # of Work Orders Closed On Time = Program Level: <ul style="list-style-type: none"> - 1 AAP - 3 Medi-Cal Type Level: <ul style="list-style-type: none"> - 1 Address Change - 3 Medi-Cal Sub Type Level: <ul style="list-style-type: none"> - 1 Address Change/Correction - 1 Aid Code - 1 BIC Request - 1 Disenrollment
% of Work Orders Closed	Current Date = 10/31/2018 Work Order #1 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Closed Create Date = 10/1/2018 Due Date = 10/8/2018 Complete Date = 10/4/2018 Work Order #2 Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3

Metric Name	Example
	<p>Status: Closed Create Date = 09/04/2018 Due Date = 09/07/2018 Complete Date = 10/2/2018</p> <p>Work Order #3 Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/8/2018</p> <p>Work Order #4 Program: Medi-Cal Type: Medi-Cal Sub Type: Disenrollment Due Days Threshold: 3 Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/3/2018</p> <p>Work Order #5 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Open Create Date = 10/23/2018 Due Date = 10/30/2018 Complete Date = N/A</p>

Metric Name	Example
	<p>Work Order #6</p> <p>Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3 Status: Open Create Date = 10/24/2018 Due Date = 10/29/2018 Complete Date = N/A</p> <p>Work Order #7</p> <p>Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Open Create Date = 09/27/2018 Due Date = 10/02/2018 Complete Date = N/A</p> <p>Work Order #8</p> <p>Program: Medi-Cal Type: Medi-Cal Sub Type: Disenrollment Due Days Threshold: 3 Status: Open Create Date = 10/16/2018 Due Date = 10/19/2018 Complete Date = N/A</p> <p>% of Work Orders Closed: AAP: 1/8 = 12.5% Medi-Cal: 37.5%</p>
% of Work Orders Open	Current Date = 10/31/2018

Metric Name	Example
	<p>Work Order #1</p> <p>Program: AAP</p> <p>Type: Address Change</p> <p>Sub Type: Address Change/Correction</p> <p>Due Days Threshold: 5</p> <p>Status: Closed</p> <p>Create Date = 10/1/2018</p> <p>Due Date = 10/8/2018</p> <p>Complete Date = 10/4/2018</p> <p>Work Order #2</p> <p>Program: Medi-Cal</p> <p>Type: Medi-Cal</p> <p>Sub Type: Aid Code</p> <p>Due Days Threshold: 3</p> <p>Status: Closed</p> <p>Create Date = 09/04/2018</p> <p>Due Date = 09/07/2018</p> <p>Complete Date = 10/2/2018</p> <p>Work Order #3</p> <p>Program: Medi-Cal</p> <p>Type: Medi-Cal</p> <p>Sub Type: BIC Request</p> <p>Due Days Threshold: 3</p> <p>Status: Closed</p> <p>Create Date = 10/1/2018</p> <p>Due Date = 10/4/2018</p> <p>Complete Date = 10/8/2018</p> <p>Work Order #4</p> <p>Program: Medi-Cal</p> <p>Type: Medi-Cal</p> <p>Sub Type: Disenrollment</p> <p>Due Days Threshold: 3</p>

Metric Name	Example
	<p>Status: Closed Create Date = 10/1/2018 Due Date = 10/4/2018 Complete Date = 10/3/2018</p> <p>Work Order #5 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Open Create Date = 10/23/2018 Due Date = 10/30/2018 Complete Date = N/A</p> <p>Work Order #6 Program: Medi-Cal Type: Medi-Cal Sub Type: Aid Code Due Days Threshold: 3 Status: Open Create Date = 10/24/2018 Due Date = 10/29/2018 Complete Date = N/A</p> <p>Work Order #7 Program: Medi-Cal Type: Medi-Cal Sub Type: BIC Request Due Days Threshold: 3 Status: Open Create Date = 09/27/2018 Due Date = 10/02/2018 Complete Date = N/A</p>

Metric Name	Example
	<p>Work Order #8</p> <p>Program: Medi-Cal</p> <p>Type: Medi-Cal</p> <p>Sub Type: Disenrollment</p> <p>Due Days Threshold: 3</p> <p>Status: Open</p> <p>Create Date = 10/16/2018</p> <p>Due Date = 10/19/2018</p> <p>Complete Date = N/A</p> <p>% of Work Orders Open:</p> <p>AAP: 1/8 = 12.5%</p> <p>Medi-Cal: 37.5%</p>
Sub Total	<p>Example:</p> <p># of Work Orders Closed On Time = 3</p> <p># of Work Orders Closed Late = 4</p> <p># of Work Orders Open On Time = 5</p> <p># of Work Orders Open Late = 6</p> <p>Sub Total = 18</p>
Number of Days Late	<p>Current Date = 10/31/2018</p> <p>Work Order #1</p> <p>Program: AAP</p> <p>Type: Address Change</p> <p>Sub Type: Address Change/Correction</p> <p>Due Days Threshold: 5</p> <p>Status: Closed</p> <p>Create Date = 10/15/2018</p> <p>Due Date = 10/22/2018</p> <p>Complete Date = 10/31/2018</p> <p>Number of Days Late = 7</p> <p>Work Order #1</p>

Metric Name	Example
	<p>Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Closed Create Date = 10/25/2018 Due Date = 11/01/2018 Complete Date = 10/30/2018 Number of Days Late = 0</p> <p>Note: Do not count County Holidays and weekends</p>
<p>Number of Days to Complete</p>	<p>Work Order #1 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Closed Create Date = 10/15/2018 Due Date = 10/22/2018 Complete Date = 10/31/2018 Number of Days to Complete = 12</p> <p>Work Order #2 Program: AAP Type: Address Change Sub Type: Address Change/Correction Due Days Threshold: 5 Status: Closed Create Date = 10/25/2018 Due Date = 11/01/2018 Complete Date = 10/30/2018 Number of Days to Complete = 3</p> <p>Note: Do not count County Holidays and weekends</p>



Design Document

SCR 201204 – EDMS: LRS Update – Image and
View Image Button URL Security Updates



DOCUMENT APPROVAL HISTORY	
Prepared By	Gillian Noelle Bendicio, Howard Suksanti
Reviewed By	Carl Moore, Long Nguyen, Balakumar Murthy, Abel Lopez, Raheem Raasikh, Christine Altavilla

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/29/2019	.1	Initial Revision	Gillian Noelle Bendicio
04/1/2019	.2	Updated with Interface recommendation.	Howard Suksanti
05/22/2019	1.1	Content Revision <ul style="list-style-type: none"> - Clarification on one-time login token in overview - Replaced one-time use token to one-time login token 	Gillian Noelle Bendicio
07/09/2019	1.2	Content Revision <ul style="list-style-type: none"> - Adding updates to the Select VLP Step 3 Image page - Adding updates to the VLP Step 3 Initiate Third Verification Request Detail page - Pass constant username in getLoginToken operation 	Gillian Noelle Bendicio

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1 OVERVIEW

This System Change Request (SCR) will document the updates made to the Electronic Document Management System (EDMS) web services which allows the worker to view the application and case images. The SCR will be a joint effort between Accenture and the Information Technology Department (ITD).

1.1 Current Design

Currently, the application and case images are available for viewing through the global navigation if they are within a context of a case and through the following pages with a 'View Images' button:

1. E-Application Summary
2. Special Investigations Detail
3. Task Detail

Additionally, the Point of Service Scan Image List, VLP Step 3 Initiate Third Verification Request Detail and Select VLP Step 3 Image pages allow a worker to view individual scanned images from EDMS.

When accessing these images through these pages, a new window will appear and direct the user to EDMS.

1.2 Requests

The current design does not prevent the worker from copying the EDMS link and sending it to unauthorized users. This impacts confidential cases. The following request have been made to address this issue:

- Provide a one-time authentication with a timeout when accessing EDMS.
- Set up a new Web Service Operation that will be used to get a one-time login token for authentication.

1.3 Overview of Recommendations

The following recommendation has been made to address the security issue:

- Update the link generated to contain an authentication token.
- Set up a new Web Service Operation that will be used to get a one-time login token for authentication. The one-time login token expires after creating a browser session once. The session is maintained in the browser window until it is closed.

1.4 Assumptions

1. The 'DCFS Images' found in the global hyperlink will not be in scope for this SCR.
2. ITD Test Environments will be available to Accenture development team on or before June 23 2019.

3. The changes required from ITD will be deployed to production on or before September 23, 2019.

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2 RECOMMENDATIONS

2.1 Global Navigation – Images

2.1.1 Overview

The 'Images' link is located on the global navigation of the system. This allows the user to access EDMS and view the case documents if they are within the context of a case.

2.1.2 Description of Changes

1. Call the new EDMS web service when the user clicks on the 'Images' link to obtain the one-time login authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.1.3 Page Location

Global: Images

Local:

Task:

2.1.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.5 Page Mapping

No impact to this section.

2.1.6 Page Usage/Data Volume Impacts

No impact to this section.

2.2 e-Application Summary

2.2.1 Overview

The 'View Images' button is located at the top right of the e-Application Summary page. Clicking this button will open a new EDMS window which contains the documents associated to the e-application.

2.2.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Images' button to obtain the one-time login authentication token.

- a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
- a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.2.3 Page Location

Global: Case Info, e-Tools

Local: e-Application Search

Task:

2.2.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.5 Page Mapping

No impact to this section.

2.2.6 Page Usage/Data Volume Impacts

No impact to this section.

2.3 Special Investigation Detail

2.3.1 Overview

The 'View Images' button is located at the top right of the Special Investigation Detail page. Clicking this button will open a new EDMS window which contains the documents associated to the case with an investigation linked.

2.3.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Images' button to obtain the one-time login authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.

The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.3.3 Page Location

Global: Special Units, Special Investigations

Local: Special Investigation Search

Task:

2.3.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.3.5 Page Mapping

No impact to this section.

2.3.6 Page Usage/Data Volume Impacts

No impact to this section.

2.4 Task Detail

2.4.1 Overview

The 'View Images' button is located at the top right of the Task Detail page. Clicking this button will open a new EDMS window which contains the documents associated to the case.

2.4.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Images' button to obtain the one-time login authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.4.3 Page Location

Global: Case Info, Tasks

Local: Worklist

Task:

Note: For tasks assigned to the case worker, a hyperlink on the task will display. Otherwise, the worker will need to click on the 'Edit' button for the related task to view the Task Detail page.

2.4.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.4.5 Page Mapping

No impact to this section.

2.4.6 Page Usage/Data Volume Impacts

No impact to this section.

2.5 Point of Service Image List

2.5.1 Overview

The Point of Service Image List contains a list of documents linked to the case. Clicking one of the document links under the 'Document Type' column will open a new EDMS window containing the image of the said document.

2.5.2 Description of Changes

1. Call the new web service when the user clicks on the document link to obtain the one-time login authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - a. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.5.3 Page Location

Global: Case Info, Case Summary

Local: Point of Service

Task:

2.5.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.5.5 Page Mapping

No impact to this section.

2.5.6 Page Usage/Data Volume Impacts

No impact to this section.

2.6 VLP Step 3 Initiate Third Verification Request Detail

2.6.1 Overview

The VLP Step 3 Initiate Third Verification Request Detail contains an image attachment selected from the 'Select VLP Step 3 Image' page. Clicking the image attachment hyperlink will open a new EDMS window containing the image of the said document.

2.6.2 Description of Changes

1. Call the new web service when the user clicks on the image attachment hyperlink to obtain the one-time login authentication token.

- a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL and the username of the staff accessing this page. The staff's information is used for auditing purposes on EDMS.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
- b. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.6.3 Page Location

Global:

Local: Verification of Lawful Presence Detail

Task:

2.6.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.6.5 Page Mapping

No impact to this section.

2.6.6 Page Usage/Data Volume Impacts

No impact to this section.

2.7 Select VLP Step 3 Image

2.7.1 Overview

The Select VLP Step 3 Image contains a list of immigration documents linked to the case. Clicking one of the document links through the corresponding 'View Image' button will open a new EDMS window containing the image of the said document.

2.7.2 Description of Changes

1. Call the new web service when the user clicks on the 'View Image' button to obtain the one-time login authentication token.
 - a. The new EDMS web service will call the 'getLoginToken' endpoint of the EDMS service to obtain the one-time login authentication token.
 - b. After obtaining the token, a new window will open and send a subsequent request to EDMS with the token appended to the base64 encoded URL and the username of the staff accessing this page. The staff's information is used for auditing purposes on EDMS.
2. Update the EDMS URL that gets generated to contain the authentication token obtained from the new webservice and use the 'https' protocol.
 - c. When the user copies the updated link to a new browser window, the EDMS page will display an error message. Refer to the below scenario table for the EDMS messages that will display:

Scenario	EDMS Error Message
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The new EDMS web service is down or has failed while the EDMS server is up	The default HTTP 404 will be displayed.
The new EDMS web service is down or has failed while the EDMS server is down	Error: Failed to connect to EDMS
The username sent by the new EDMS web service is invalid	Error: Invalid user (username)
The token appended to the EDMS URL is invalid	Error: Authentication failed. The token is invalid.
The one-time login token has already been used	Error: Authentication failed. The token is invalid.

Technical Note: The existing URL will be appended with a new request attribute, DM_TICKET, followed by an equal sign and then the encrypted authentication token. The default value of DM_TICKET is null until it gets populated by the new EDMS web service. If the new web service is down, the default value will remain as null.

2.7.3 Page Location

Global:

Local: VLP Step 3 Initiate Third Verification Request Detail

Task:

2.7.4 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping

Security Groups

Security Group	Group Description	Group to Role Mapping

2.7.5 Page Mapping

No impact to this section.

2.7.6 Page Usage/Data Volume Impacts

No impact to this section.

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2.8 Set up a new Web Service Operation on the EDMS web service.

2.8.1 Overview

The new web service operation will be added to the existing EDMS web service. The web service operation will be used to get a one-time login token for authentication.

2.8.2 Description of Change

Set up the new web service operation ('getLoginToken') that will be used to get a one-time login token for authentication.

Web Service details:

1. Operation name: 'getLoginToken'.
2. Request parameter:

getLoginToken – REQUEST			
FIELD NAME	TYPE	COMMENTS	REQUIRED
userName	String	Login username. userName constant is "leader_reader"	Y

3. Response parameter:

getLoginToken – RESPONSE			
FIELD NAME	TYPE	COMMENTS	REQUIRED
loginToken	String	Single use token string.	Y

Please refer to more details in the XSD file in the supporting document. Exception while retrieving authentication token will not be handled by the Interface. The exception will be handled by the web service caller.

Note: ITD will create an operation within current webservice to pass one-time token to construct URL.

2.8.3 Execution Frequency

Real time.

2.8.4 Key Scheduling Dependencies

N/A.

2.8.5 Counties Impacted

Los Angeles county only.

2.8.6 Data Volume/Performance

N/A.

2.8.7 Interface Partner

ITD.

2.8.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Imaging	EDMS updated XSD file.	 EdmsWebserviceService_schema.xsd

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4 REQUIREMENTS

The SCR will update the web service that CalACES communicates with external partner - EDMS.

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.19	The LRS shall have the ability to receive data from external sources (e.g., State's SACWIS system and COUNTY-approved agencies/partners) for the purposes of establishing and maintaining a case.	The SCR will update the web service that CalACES communicates with external partner - EDMS.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

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