



Design Document

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

DOCUMENT APPROVAL HISTORY		
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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	
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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

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						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

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		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

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						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

DRAFT

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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

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

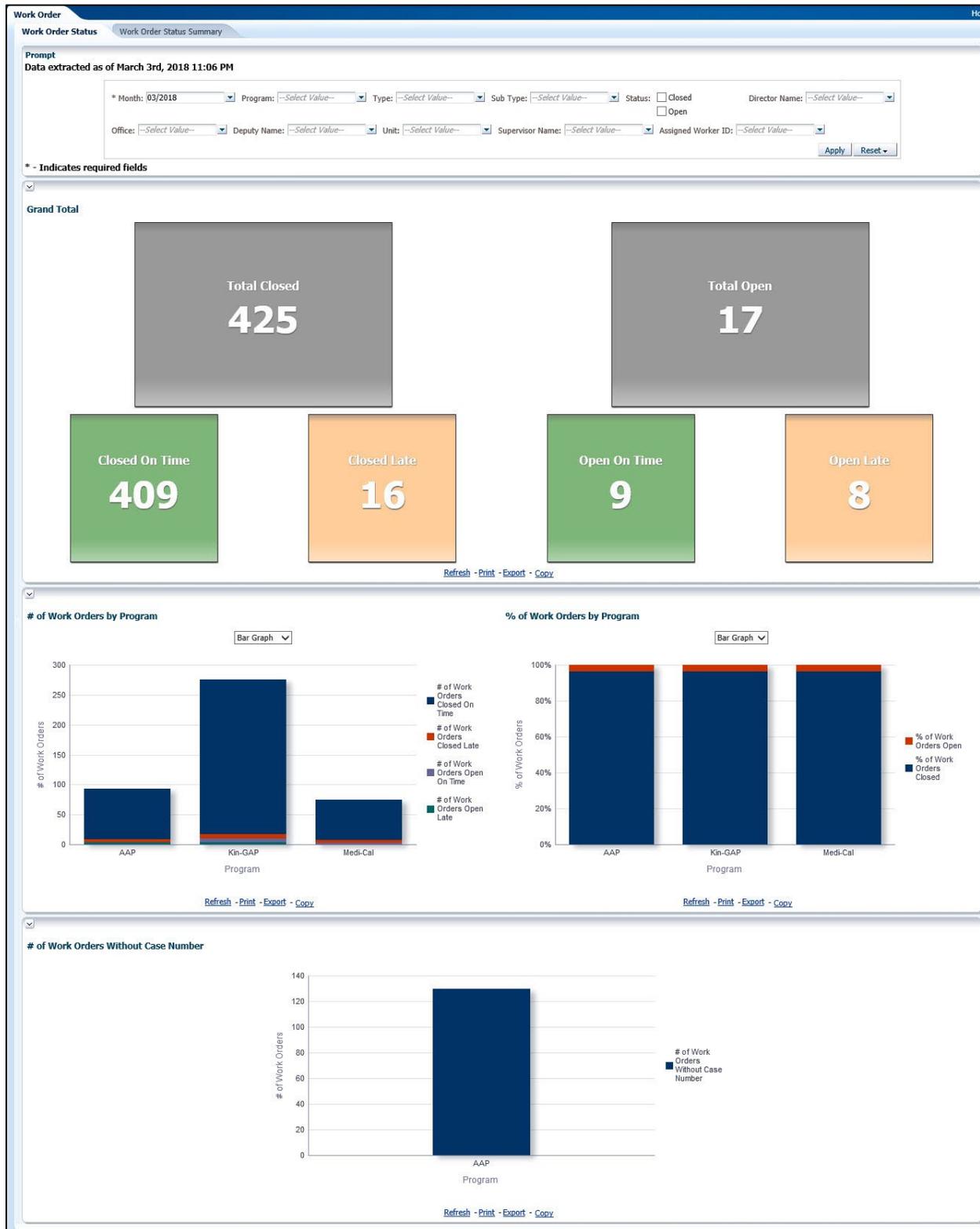
	<p>the Program, Type and Sub Type levels.</p> <p>Note: See Appendix: Metrics for examples.</p>	
# of Work Orders Closed On Time	<p>The number of Work Orders which were closed before or on the Due Date by a worker in the prompted month(s).</p> <p>Note: See Appendix: Metrics for examples.</p>	# of Work 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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DRAFT

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.

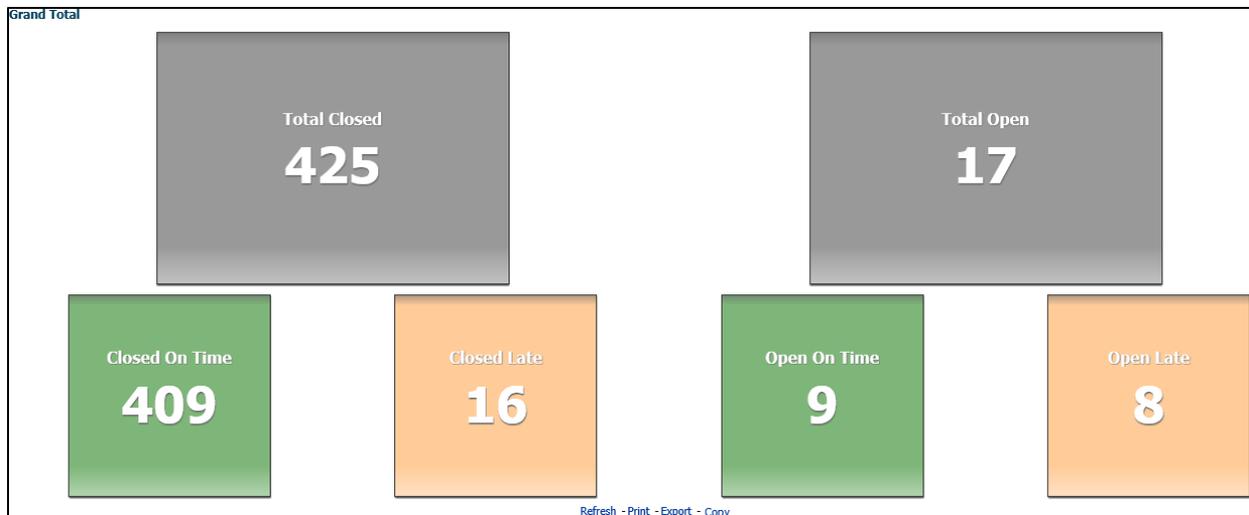


Figure 2.1.4.2.1 - Grand Total – Performance Tiles

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.

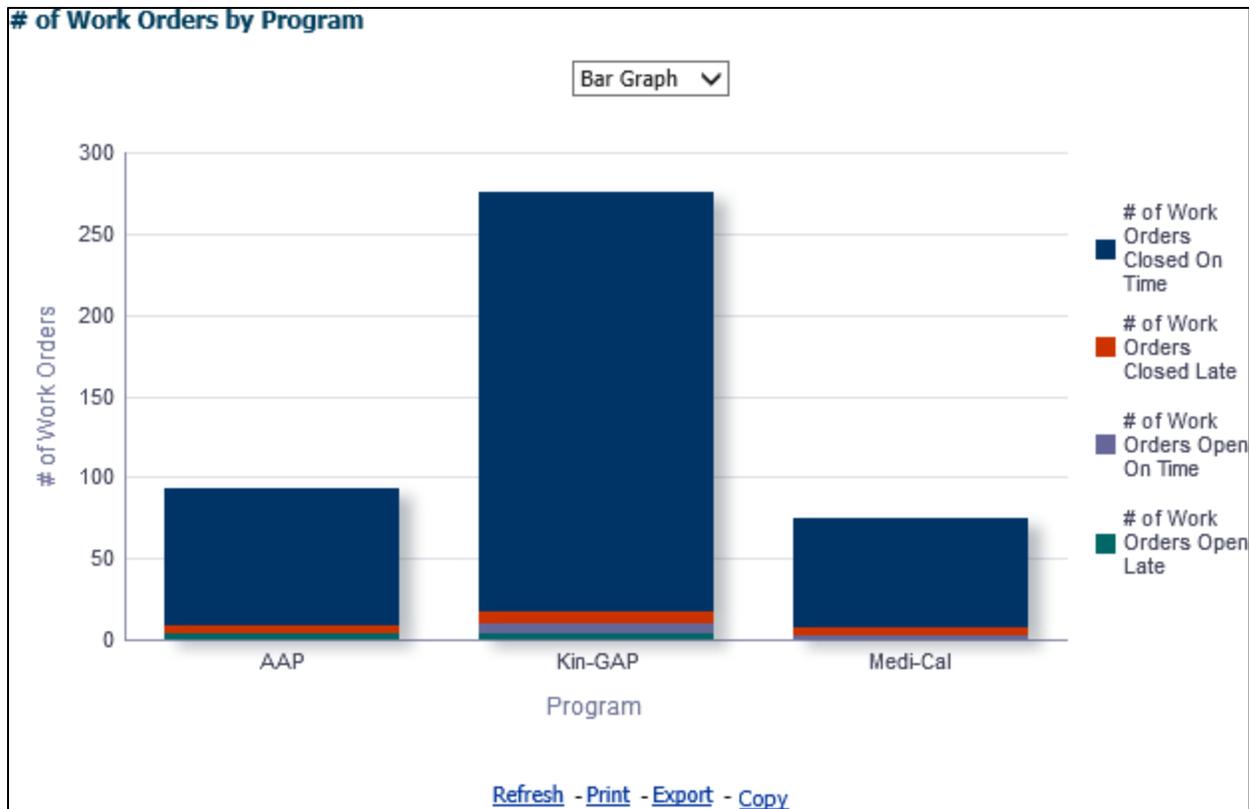


Figure 2.1.4.2.2-1 - # of Work Orders by Program – Bar Graph

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.

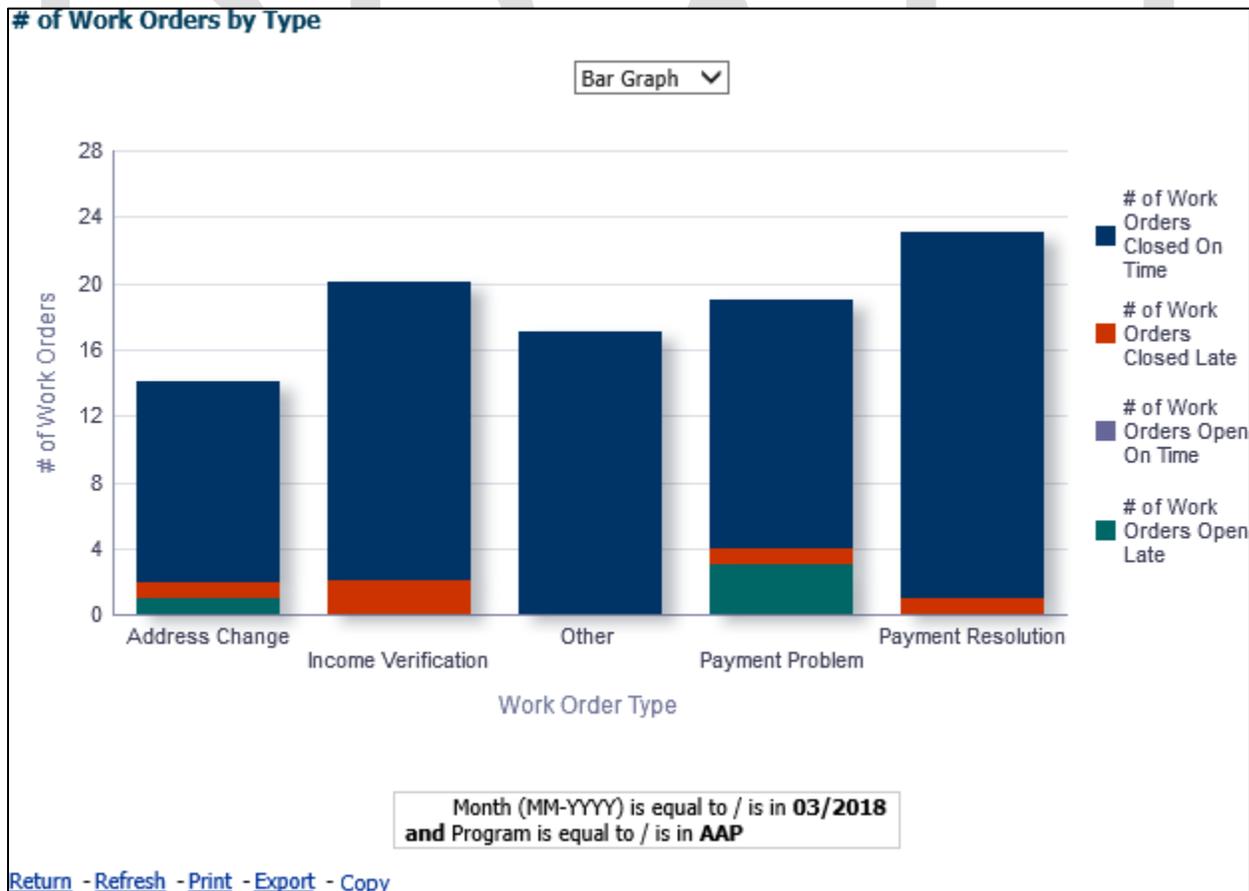


Figure 2.1.4.2.3-1 - # of Work Orders by Type – Bar Graph

# 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.

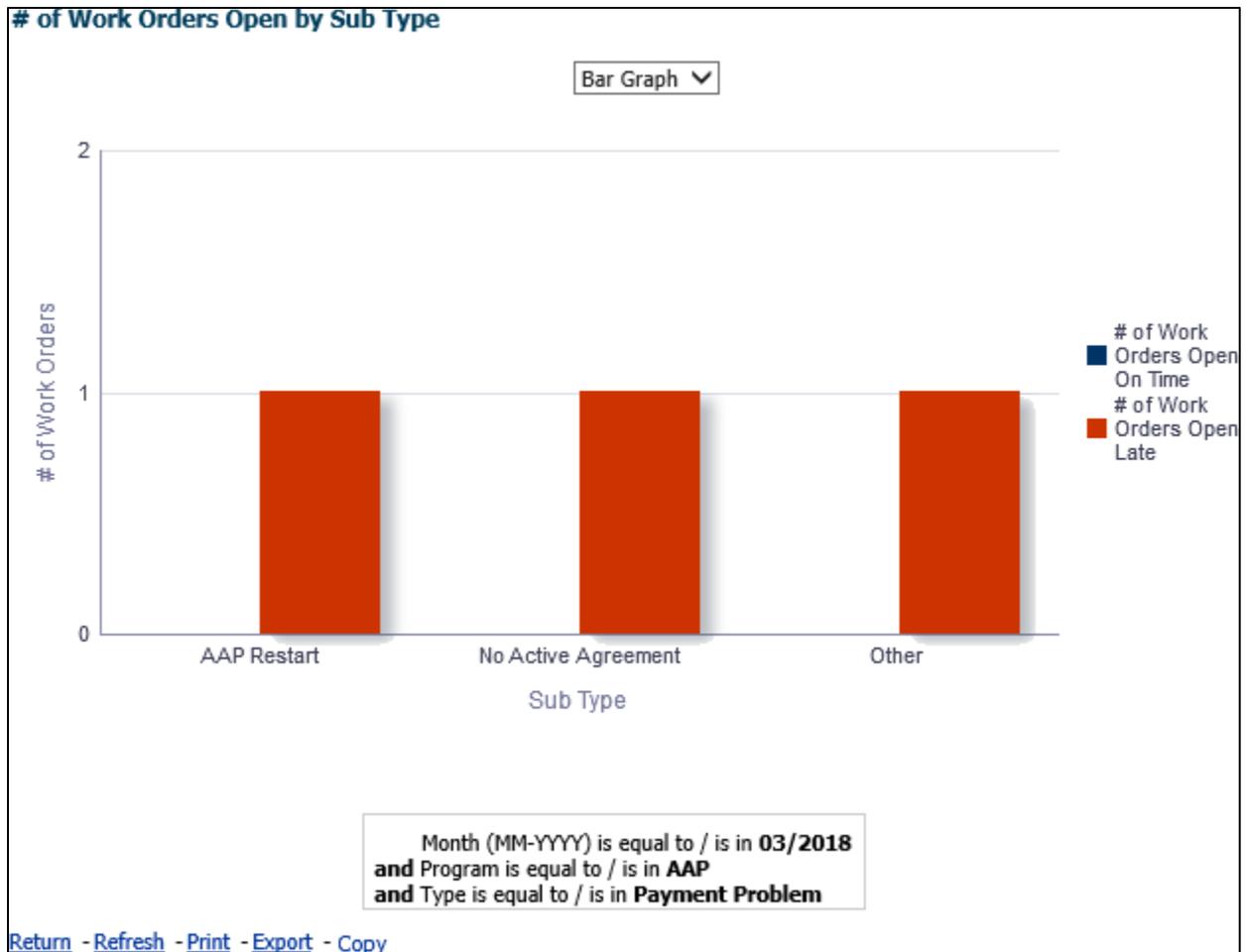


Figure 2.1.4.2.4-1 - # of Work Orders Open by Sub Type – Bar Graph

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.

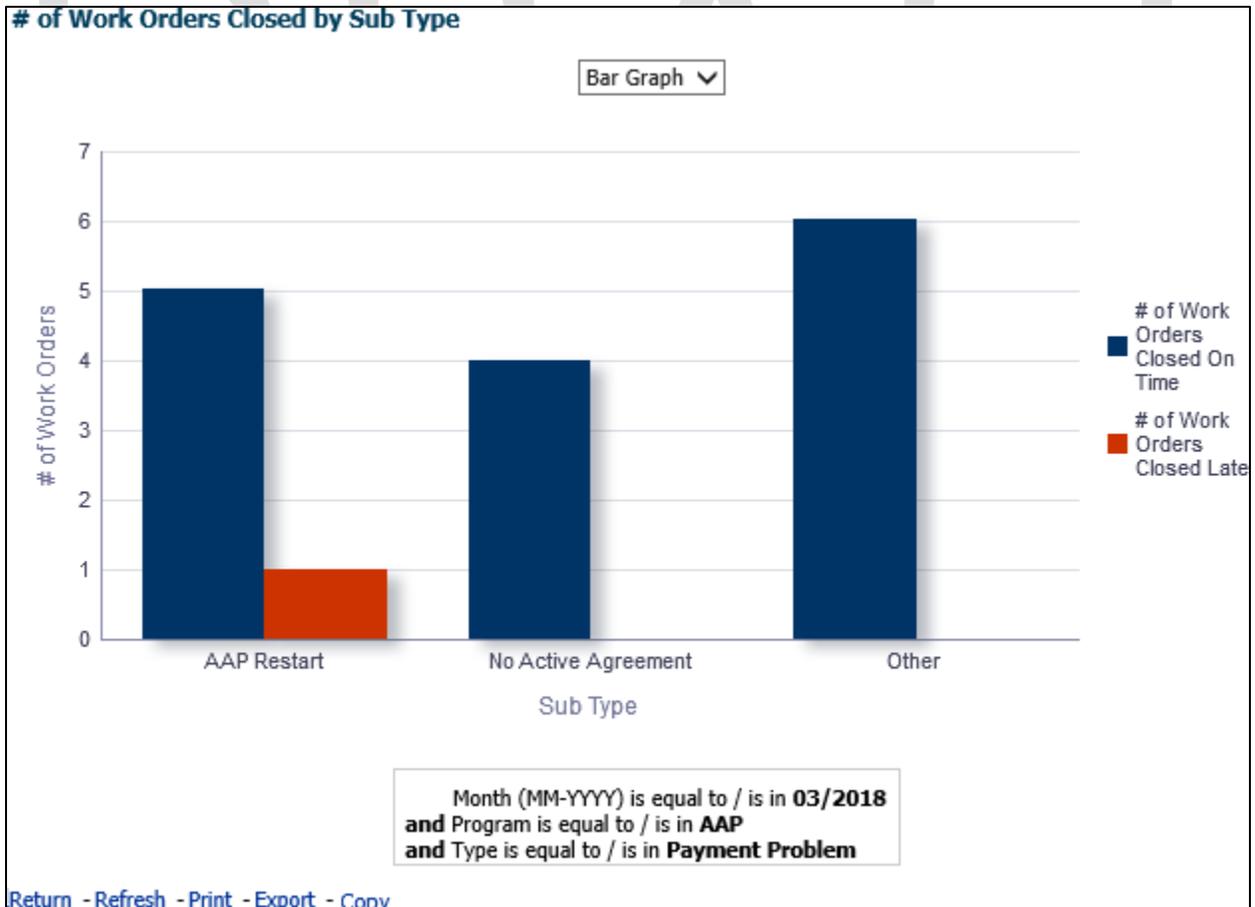


Figure 2.1.4.2.5-1 - # of Work Orders Closed by Sub Type – Bar Graph

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.

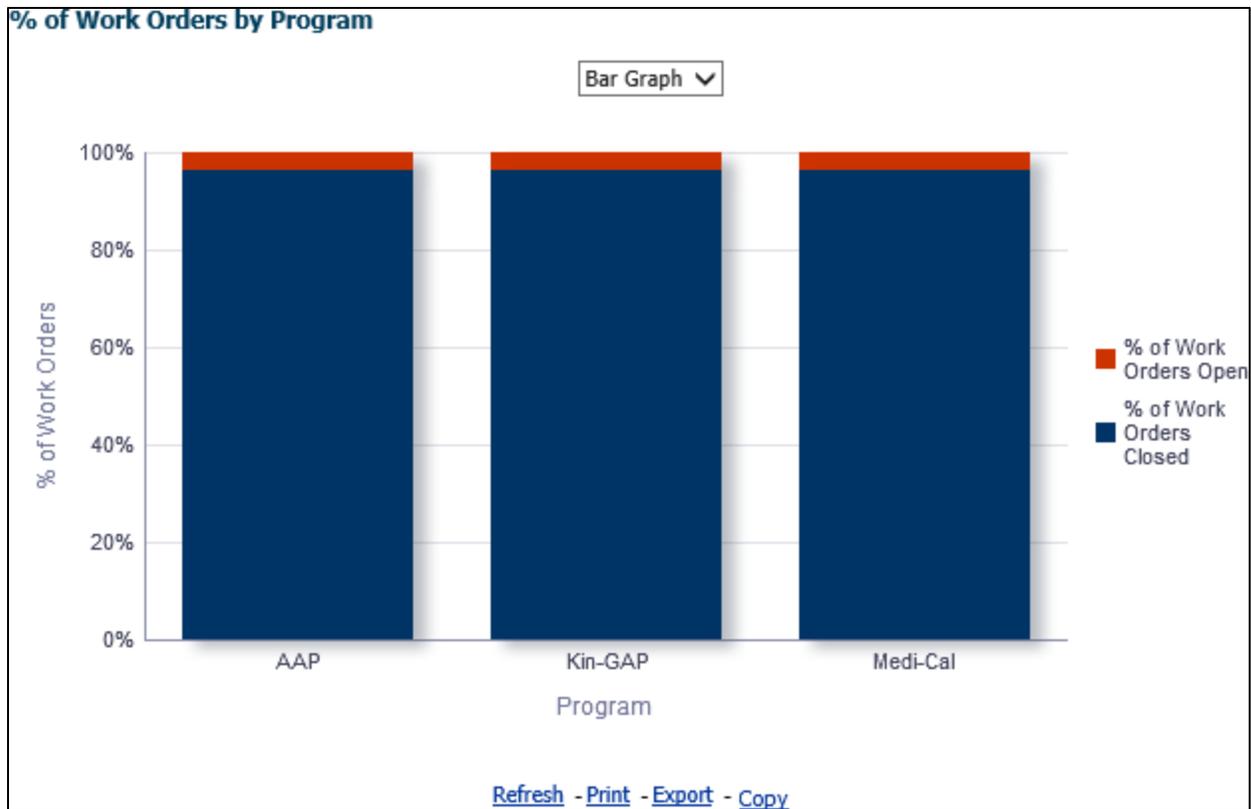


Figure 2.1.4.2.6-1 - % of Work Orders by Program – Bar Graph

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.

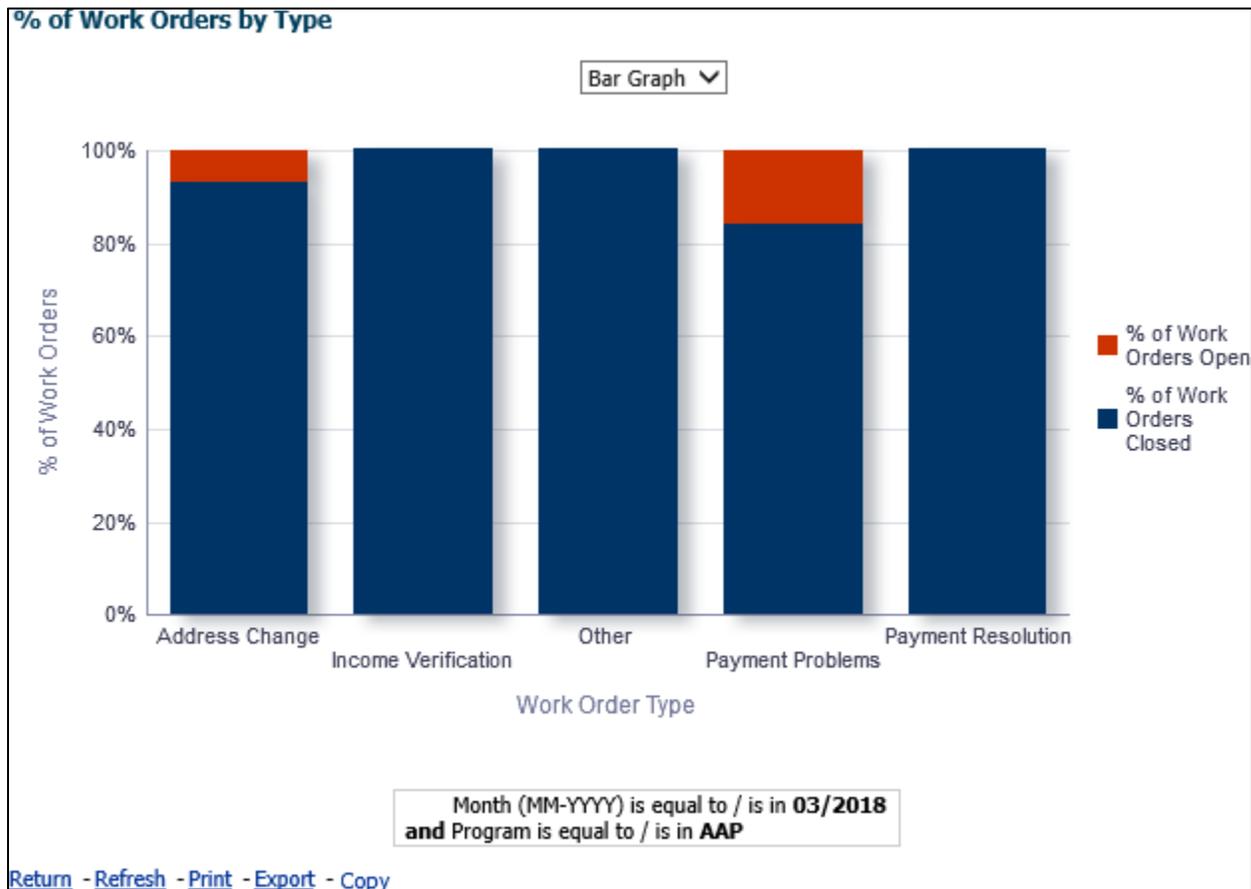


Figure 2.1.4.2.7-1 - % of Work Orders by Type – Bar Graph

% of Work Orders by Type

Table ▼

Work Order Type	% of Work Orders Closed	% of Work Orders Open
Address Change	93.00%	7.00%
Income Verification	100.00%	0.00%
Other	100.00%	0.00%
Payment Problems	84.00%	16.00%
Payment Resolution	100.00%	0.00%

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

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

Figure 2.1.4.2.7-2 - % 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.

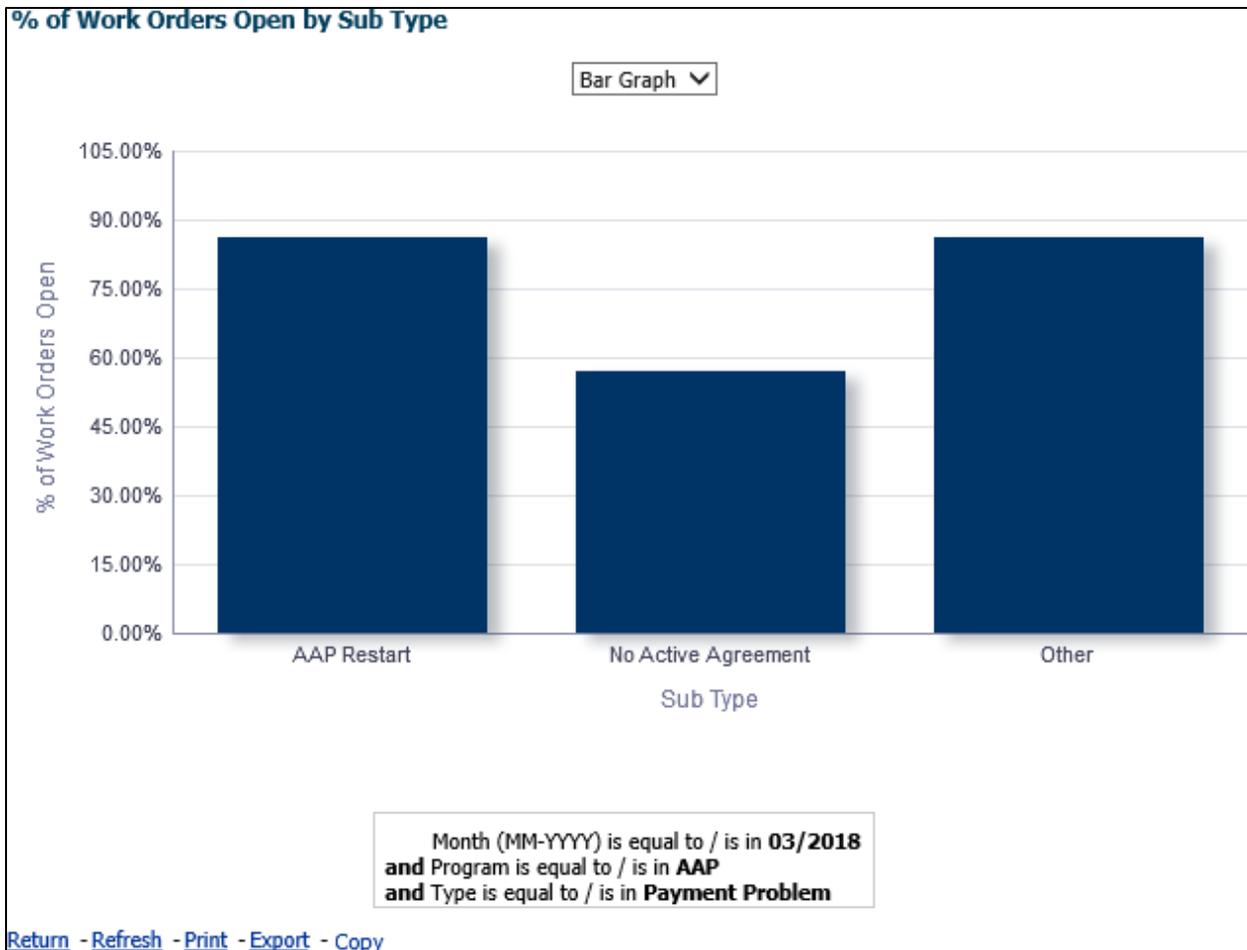


Figure 2.1.4.2.8-1 - % of Work Orders Open by Sub Type – Bar Graph

% 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.

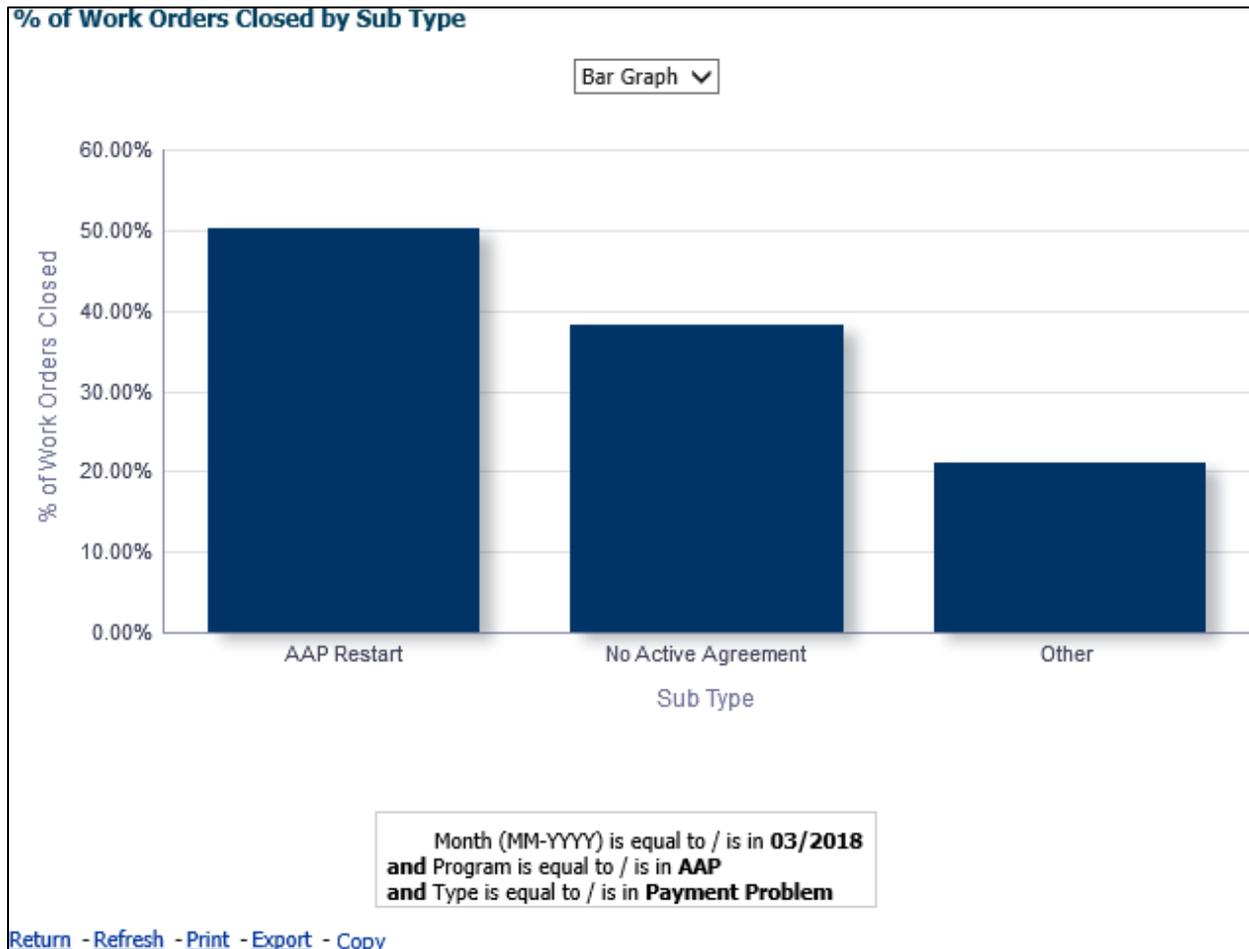


Figure 2.1.4.2.7-1 - % of Work Orders Closed by Sub Type – Bar Graph

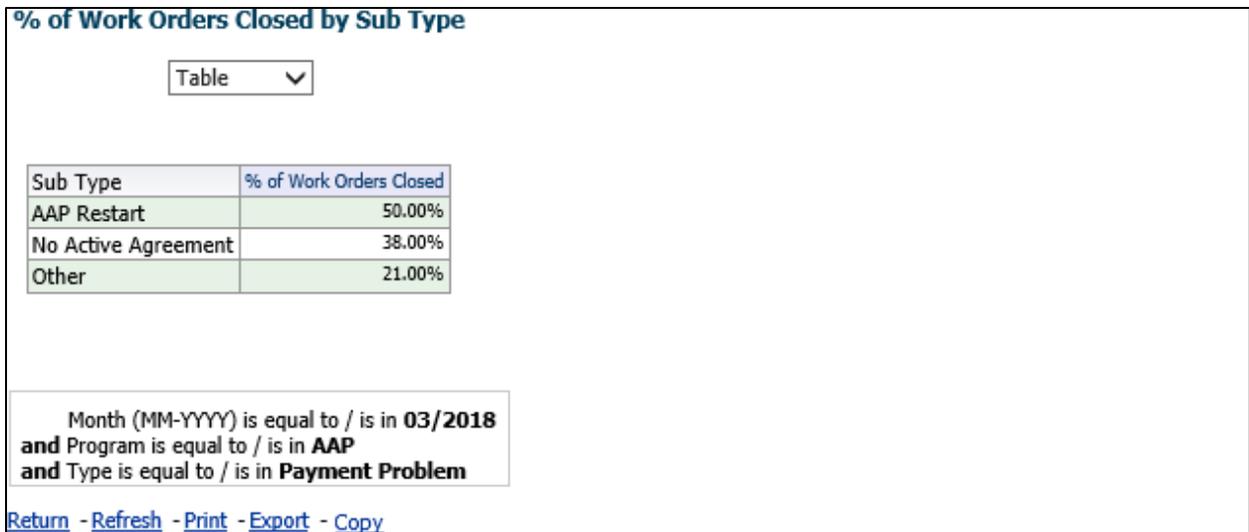


Figure 2.1.4.2.9-2 - % of Work Orders Closed by Sub Type – Table

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.

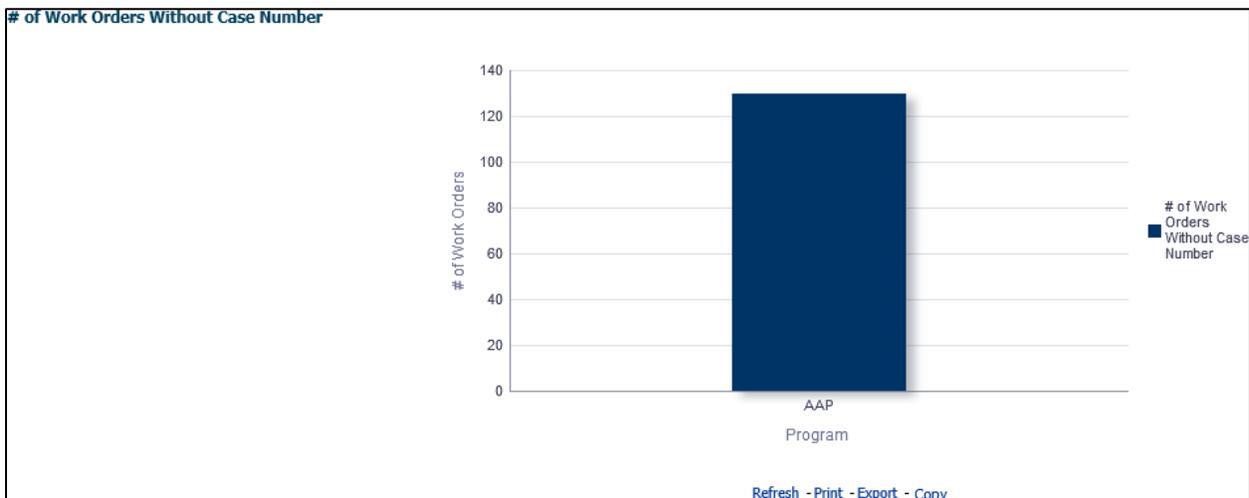


Figure 2.1.4.2.10 - # of Work Orders Without Case Number – Bar Graph

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 Open Late	# of Work Orders Open On Time	Sub Total	# of Work Orders Closed On Time	# of Work Orders Open Late	# of Work Orders Open On Time	Sub Total	# of Work Orders Closed On Time	# of Work Orders Open Late	# of Work Orders Open On Time	Sub Total			
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	11	2	1	2	16
	Emergency	Infant (0-2 years)	4	0	0	0	4	0	0	0	4	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	5
		Other	6	1	1	1	9	6	1	0	4	9	6	1	0	0	8
	Payment Problem	PAS Age Rate Increase	2	1	1	0	4	8	1	0	0	9	12	1	0	0	23
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	1
	Payment Problem	No Payment	2	2	2	1	7	0	1	0	1	2	22	2	2	1	27
		Rate	6	0	0	2	8	0	2	0	2	4	36	0	1	2	39
		Affiliate	6	2	2	1	11	4	1	0	3	8	46	1	2	1	50
		Emergency	4	0	0	0	4	0	0	0	0	0	44	0	0	0	44
Kin-GAP Total			18	5	4	4	33	4	4	0	13	20	238	7	6	4	275
Medi-Cal	CEC	Approval	3	3	1	0	7	2	3	0	7	12	53	3	1	0	57
	Transitional	Other	4	1	1	0	6	2	0	0	2	6	34	1	2	0	37
Medi-Cal Total			7	4	2	0	13	4	3	0	9	18	67	4	3	0	74
Grand Total			59	13	8	8	88	40	20	0	45	105	409	16	9	8	442

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.

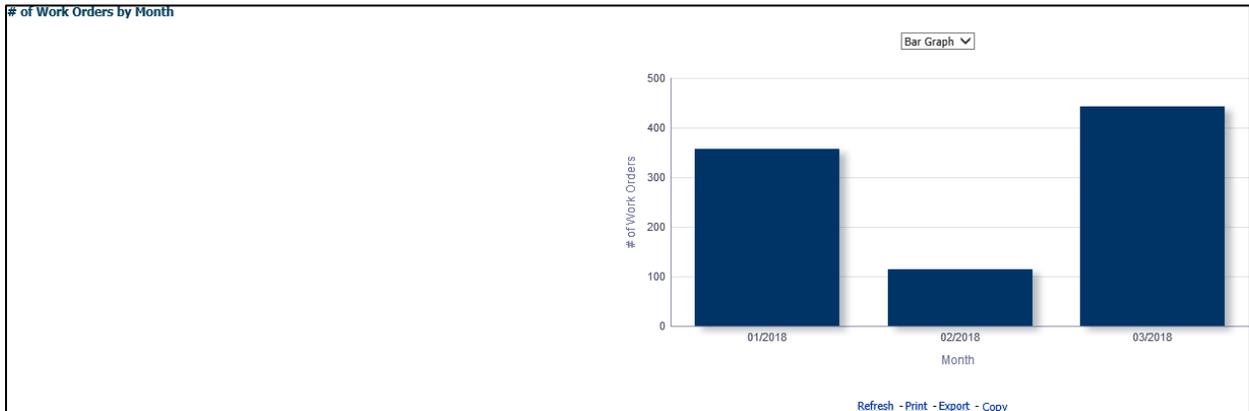


Figure 2.1.5.2.2-1 - # of Work Order by Month – Bar Graph

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.

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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
Work Order Number	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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	X000000	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.

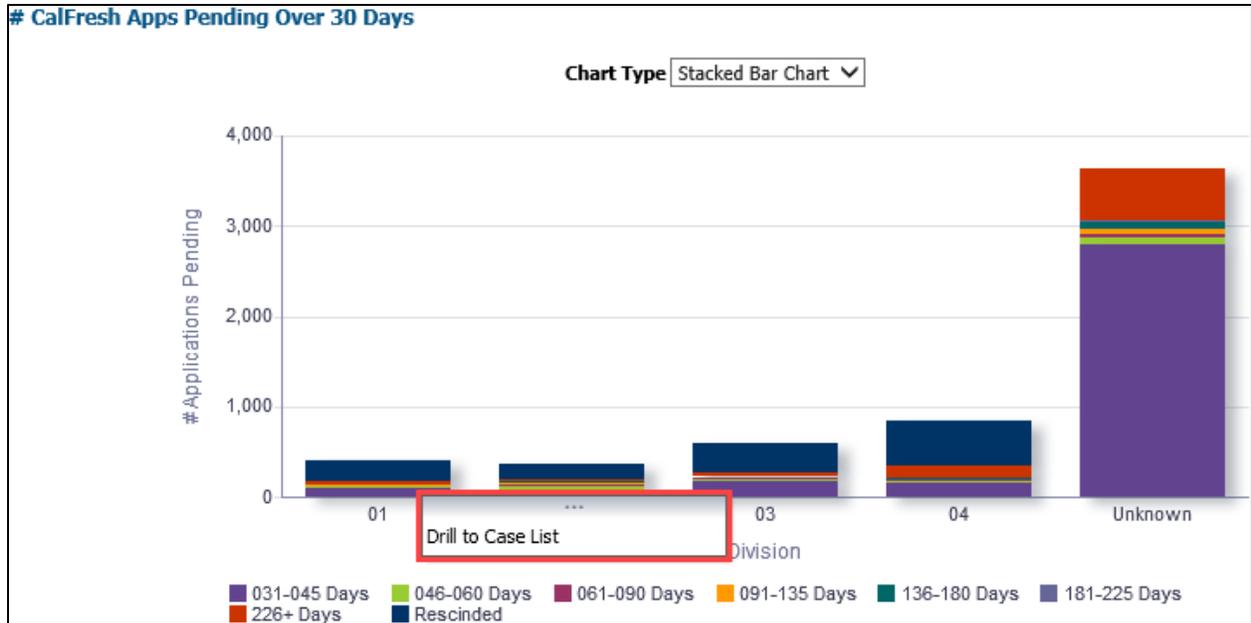


Figure 2.2.1-1 – Drill down link list

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
XXX		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</p> <p>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</p> <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 to Complete = 3</p> <p>Note: Do not count County Holidays and weekends</p>



Design Document

CA-206854 CIV-8470 – Add and Remove Staff
Classification Titles



DOCUMENT APPROVAL HISTORY	
Prepared By	Robert Untalan
Reviewed By	Araceli Gallardo, Jose Sepulveda, Akira Moriguchi, Michael Wu, Himanshu Jain, William Baretsky, Srividhya Sivakumar, Carl Moore, Christine Altavilla, Frances Baez-Lugo, Lisa Nesci, Rachel Cousineau, Matthew Lower

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/06/2019	V1.0	Initial Draft for Committee Review	Robert Untalan

DRAFT

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1 OVERVIEW

The Classification Title is used to categorize Staff. This enhancement will bring the system in line with the current Staff Classification Titles used in the counties.

1.1 Current Design

Staff Records are created and maintained on the Staff Detail page. The list of available Classification Titles are available on this page and is required for a Staff record to be created.

1.2 Requests

Update the Classification Titles available for each county to match the values provided through the CRFI process.

1.3 Recommendations

Update the available Classification Titles for Staff members to match the request by each county. For the LRS system, add the C-IV Classification Titles. These added Classification Titles will only be validated through the database using the code detail table. For Counties removing Classification Titles, set the Staff to have the Classification Title of 'Temporary Employee' and provide a list of these users to the counties.

1.4 Assumptions

- Only requested Classification Titles for Staff records will be updated.
- Only counties that have requested Classification Titles updates will have their Classification Titles updated.
- The counties that have requested the removal of Classification Titles will have existing staff members assigned to the 'Temporary Employee' Classification Title and will have that Classification Title enabled for their county.

2 RECOMMENDATIONS

2.1 Staff Detail

2.1.1 Overview

The Staff Detail page allows the user to view, edit, and add Staff records. These records set the Classification Title for the Staff member.

2.1.2 Staff Detail Mockup

Staff Detail

*- Indicates required fields

Save Cancel

General Staff Information

First Name:	Middle Name:	Last Name: *	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Staff Status Code: *	Classification Title: *		Staff ID:
<input type="text"/>	<ul style="list-style-type: none">- Select -Accountant IAccountant IIAccountant IIIAccountant TechnicianAdministration Supervisor IAdministration Supervisor IIAppeals SpecialistAssistant Auditing ManagerAssistant Communications SpecialistAssistant to the DirectorAssociate Administration OfficerAuditing ManagerAutomated Systems Analyst IAutomated Systems Analyst IIAutomated Systems TechnicianBuilding & Services ManagerBusiness AnalystBusiness Applications ManagerBusiness Systems Analyst IBusiness Systems Analyst IIBusiness Systems Analyst IIICase Review SpecialistChief ArchivistChief Learning OfficerCommunications and Career Services ManagerDepartment Information Service ManagerDeputy Administrative OfficerDeputy DirectorDirector		<input type="text"/>
Regional Call Center:			
Available Hours: (Day-Day Time)	<input type="text"/>		
Additional Information:	<input type="text"/>		

Spoken Language Information

Spoken Language *	Proficiency *
<input type="text"/>	<input type="text"/>

Add

Written Language Information

Figure 2-1 Staff Detail Classification Title drop down

2.1.3 Description of Changes

Add and remove values in Staff Detail page's Classification Title field drop down as requested for each county, refer to titled document 'Added and Removed County Staff Classifications' in the Supported Documents section.

2.1.4 Page Location

Global:Tools

Local:Office

Task:Staff

2.1.5 Page Usage/Data Volume Impacts

No change.

2.2 Data Change: Setting default value for removed Classification Titles.

2.2.1 Overview

This data change will associate a Classification Title for users assigned a title that is no longer available in the county.

2.2.2 Description of Change

Update Staff member's Classification Title to the value of 'Temporary Employee' when the Classification Title is no longer available. For Counties that do not have 'Temporary Employee' available, make the Classification Title available.

2.2.3 Estimated Number of Records Impacted/Performance

- LRS no change.
- C-IV, about 3,500 records will be associated to value of 'Temporary Employee'.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1.	Online	Added and Removed Classification Titles. Updated titles are highlighted in Yellow. Added titles are highlighted in Green.	 Added and Removed County St:

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.25.1.3	The LRS shall maintain information on all COUNTY staff and any appropriate staff from other LRS agencies that access LRS cases and/or LRS Data.	Updates will maintain information on all COUNTY staff.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	How Requirement Met
	N/A	

5 MIGRATION IMPACTS

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

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6 OUTREACH: CIV ONLY

Provide a list for all users that have had their Classification Title removed and associated to Classification Title of 'Temporary Employee'. The list will contain County Code, Staff ID, First Name, Last Name, Email Address, and Phone Number.

I.E.

County Code	Staff ID	First Name	Last Name	Email Address	Phone Number
50	111111	Bruce	Wayne	wbruce@wenterprise.org	(555)555-5555

Add below text on the posted list 'County Action' tab:
Counties should review the Staff to reevaluate the Staff Classification and determine if updates will need to be made from the Staff Detail page.

Lists will be posted at following location:

CalACES Web Portal>System Changes>SCR and SIR Lists>2019>CIV-8470

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