Design Document

CA – 50808 Child Welfare Program: BI: Vendor Dashboard Report

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1 OVERVIEW

1.1 Current Design

Updates to **Child Welfare Services / Case Management System (CWS/CMS)** vendors are sent to **LRS** via the **CWS/CMS** interface. Datamart is an Oracle database which extracts Foster Care data from the LRS system. An LRS batch job runs nightly and identifies and stores any discrepancies between the vendor related information in both systems. The **Task Management Business Intelligence (BI) dashboard** and **Daily Skipped Issuance Report**, are used to help identify the vendor record(s) requiring corrective action. When discrepancies are detected, changes may have to be made in the CWS/CMS System or **LRS** system.

1.2 Requests

Task Management BI dashboard is driven by case number, not CWS/CMS vendor number. The Daily Skipped Issuance Report is used as a workaround to identify any vendor records which require corrections in either system. However, the report is limited to skipped issuances and does not capture the population of vendors with missing/mismatched vendor information.

1.3 Overview of Recommendations

- Develop a new vendor BI dashboard page which provides information on vendor information discrepancy between the CWS/CMS and LRS system. The dashboard must:
    a. Include the vendor counts by **Placement Types**
    b. Include vendor counts without **Vendor ID's**
    c. Identify the vendor **Exception Reasons**
        i. The Exception Reasons identifies the discrepancies between CWS/CMS and LRS
    d. Include vendor counts by Exception Reasons
    e. Include number of Exception Reasons for each month
    f. Include case lists which provide vendor information and the specific 'Exception Reasons'
    g. Include a count of all vendor exceptions which are resolved
    h. Include vendor counts for a specified range of months
    i. Include a full list of all 'Vendors', 'Vendor Types', 'Programs', 'Placement Types' and 'Exception Reasons'
    j. Create a new security role to restrict access to the Vendor dashboard
- Create new reporting table to retain the outgoing exception list when processing the DCFS Inbound files from DataMart/DCFS for a period of 90 days.
- Update the Inbound readers for FC, KG and AAP programs to process the inbound files received from DCFS data mart and parse the exception data to the new reporting table.

1.4 Assumptions

Assumption Point	Details	Potential Impact
1.	A single vendor can have multiple Vendor Types	One Vendor ID may be counted as many as the Vendor Types in both the top-level widgets and lower-level case lists.
2.	Large Month ranges will slow down the dashboards as well as exports.	The entire dashboard including second and third level reports, and case lists.
3.	Dashboard will not retain incremental history.	The entire dashboard including second and third level reports, and case lists.
4.	Vendor information will only be displayed in dashboard if associated case programs are active.	The entire dashboard including second and third level reports, and case lists.
5.	Exceptions identified before deployment will not be available in the dashboard. Only data captured after the day of deployment will be available.	The entire dashboard including second and third level reports, and case lists.
6.	Users will not have the ability to see other dashboards if they only have rights to see the Vendor dashboard.	User security rights.
7.	Mockups in design are only examples of how the data will look and might not always be accurate to actual data.	The entire dashboard including second and third level reports, and case lists.
8.	Days to Resolve Vendor exception reasons must not count weekends or County Holidays.	The entire dashboard including second and third level reports, and case lists.

2 RECOMMENDATIONS

2.1 Placement Vendor Exception Report Dashboard

2.1.1 Overview

The **Placement Vendor Exception Report** dashboard page will provide metrics on the Child Welfare Vendors. The information in this dashboard shall reflect data available in the Foster Care Resource Databank and information received from the CWS/CMS Interface. The dashboard page will update nightly and focus on the number of Vendors flagged with an 'Exception Reason'. The page will also provide metrics on Vendors by 'Program', 'Placement Type', as well as identify Vendor information received without Vendor IDs. The widgets will also drill down to a granular case list.

2.1.2 Page Description

Table 1 – Page

Dashboard Name	Page Name
Placement Vendor Exception Report	**Vendor Transaction Exception Reasons**
Placement Vendor Exception Report	**Exception Reason Monthly Distribution**

2.1.3 Metric Definition

Table 2 – Metrics

Metric Name	Metric Definition	Related Widget
Vendors	The number of CWS/CMS providers that have discrepancies between the CWS/CMS Interface and the LRS System	# of Vendors by Placement Types, # of Vendors without IDs and # of Vendors by Month
Exception Reasons	The total number of discrepancies in vendor information between the LRS system and CWS/CMS	# of Exception Reasons by Month and # of Exception Reasons Resolved

2.1.4 Placement Vendor Exception Report – Vendor Transaction Exception Reasons Page Layout

Placement Vendor Exception Report

Vendor Transaction Exception Reasons | Exception Reason Monthly Distribution

Prompt
Data extracted as of March 3rd, 2016 11:06 PM

* From Month: 01/2016 | * To Month: --Select Value-- | Vendor ID: --Select Value-- | Placement Type: --Select Value--

Apply | Reset

* - Indicates required fields

# of Vendors by Placement Types (Bar Graph)

# of Vendors without IDs

Refresh - Print - Export - Copy

# of Exception Reasons Resolved

Refresh - Print - Export - Copy

Exception Reasons Transaction List

Days to Resolve Exception Reason
1 Day: (green) | 2 Days: (yellow) | >= 3 Days: (red)

Placement Type: Foster Family Agency (Treatment) | Exception Reason: Invalid Value

Case Number	Program	Vendor ID	Vendor Name	Vendor Address	Vendor Phone	Vendor Type	Placement ID	Placement Date	Placement Type	Exception Reason	# of Days to Resolve
XXXXXXX	AAP	Vendor ID	Vendor Name 10.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/09/2016	Foster Family Agency (Treatment)	Invalid Value	1
XXXXXXX	AAP	Vendor ID	Vendor Name 100.0	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/08/2016	Foster Family Agency (Treatment)	Invalid Value	2
XXXXXXX	AAP	Vendor ID	Vendor Name 100.0	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/02/2016	Foster Family Agency (Treatment)	Invalid Value	17
XXXXXXX	AAP	Vendor ID	Vendor Name 12.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/11/2016	Foster Family Agency (Treatment)	Invalid Value	3
XXXXXXX	AAP	Vendor ID	Vendor Name 13.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/15/2016	Foster Family Agency (Treatment)	Invalid Value	8
XXXXXXX	AAP	Vendor ID	Vendor Name 15.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/01/2016	Foster Family Agency (Treatment)	Invalid Value	6
XXXXXXX	AAP	Vendor ID	Vendor Name 15.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/25/2016	Foster Family Agency (Treatment)	Invalid Value	2
XXXXXXX	AAP	Vendor ID	Vendor Name 2.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/04/2016	Foster Family Agency (Treatment)	Invalid Value	2
XXXXXXX	AAP	Vendor ID	Vendor Name 21.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/30/2016	Foster Family Agency (Treatment)	Invalid Value	2
XXXXXXX	AAP	Vendor ID	Vendor Name 22.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/24/2016	Foster Family Agency (Treatment)	Invalid Value	2
XXXXXXX	AAP	Vendor ID	Vendor Name 23.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/03/2016	Foster Family Agency (Treatment)	Invalid Value	8
XXXXXXX	AAP	Vendor ID	Vendor Name 24.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/09/2016	Foster Family Agency (Treatment)	Invalid Value	2
XXXXXXX	AAP	Vendor ID	Vendor Name 26.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/29/2016	Foster Family Agency (Treatment)	Invalid Value	8
XXXXXXX	AAP	Vendor ID	Vendor Name 30.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/31/2016	Foster Family Agency (Treatment)	Invalid Value	1
XXXXXXX	AAP	Vendor ID	Vendor Name 32.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/23/2016	Foster Family Agency (Treatment)	Invalid Value	11
XXXXXXX	AAP	Vendor ID	Vendor Name 34.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/30/2016	Foster Family Agency (Treatment)	Invalid Value	6
XXXXXXX	AAP	Vendor ID	Vendor Name 34.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/31/2016	Foster Family Agency (Treatment)	Invalid Value	11
XXXXXXX	AAP	Vendor ID	Vendor Name 44.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/10/2016	Foster Family Agency (Treatment)	Invalid Value	4
XXXXXXX	AAP	Vendor ID	Vendor Name 44.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/29/2016	Foster Family Agency (Treatment)	Invalid Value	1
XXXXXXX	AAP	Vendor ID	Vendor Name 46.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/02/2016	Foster Family Agency (Treatment)	Invalid Value	3
XXXXXXX	AAP	Vendor ID	Vendor Name 46.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/08/2016	Foster Family Agency (Treatment)	Invalid Value	8
XXXXXXX	AAP	Vendor ID	Vendor Name 5.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/24/2016	Foster Family Agency (Treatment)	Invalid Value	6
XXXXXXX	AAP	Vendor ID	Vendor Name 51.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/17/2016	Foster Family Agency (Treatment)	Invalid Value	7
XXXXXXX	AAP	Vendor ID	Vendor Name 55.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	Placement ID	03/21/2016	Foster Family Agency (Treatment)	Invalid Value	1
XXXXXXX	AAP	Vendor ID	Vendor Name 58.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	Placement ID	03/21/2016	Foster Family Agency (Treatment)	Invalid Value	7

Rows 1 - 25

Refresh - Print - Export - Copy

2.1.4.1 Prompt Detail

Table 3 – Prompt Description

Filter Name	Default Value	Filter Type
*From Month	Current month	Multi-select option to filter data by the start month in a range. The data will display as of the day a user is viewing the dashboard. See Assumptions for range limits.
*To Month	Current Month	Multi-select option to filter data by the end month in a range. The data will display as of the day a user is viewing the dashboard. See Assumptions for range limits.
Vendor ID	All	Multi-select option to filter data by 'Vendor ID'
Placement Type	All	Multi-select option to filter data by Child Welfare 'Placement Type'.

Note: * indicates that 'From Month' and 'To Month' filters are always required.

Table 4 - Logic for parameters will be as follows:

Dashboard Page	Parameters Addition	Parameter Description
Vendor Transaction Exception Reasons	**Add** "From 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 "To 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 "Vendor ID" dropdown prompt.	The values will be the 6 digit CMS/CWS Number in the Foster Care Resource Detail Page for all vendors.
	Add "Placement Type" dropdown prompt.	The values will be the types of institutions a child is placed.

2.1.4.2 Widget Details

2.1.4.2.1 # of Vendors by Placement Types

Widget shall display the total number of Vendors by child 'Placement Types' during the prompted month(s).

1. The widget shall toggle between 'Bar Graph' and 'Table'
   a. 'Bar Graph' view shall be the first to load by default and 'Table' view will be the second option.
   b. The 'Bar Graph' and 'Table' shall display 'Placement Types' with the following metrics:
      i. # of Vendors
2. The report will sum the values for all months for each 'Placement Types' and metric when filtered for multiple months.

Note: A vendor can have more than one Placement Type. Therefore, a single vendor may be counted in multiple Placement Types. The widget and case list will reflect the data.
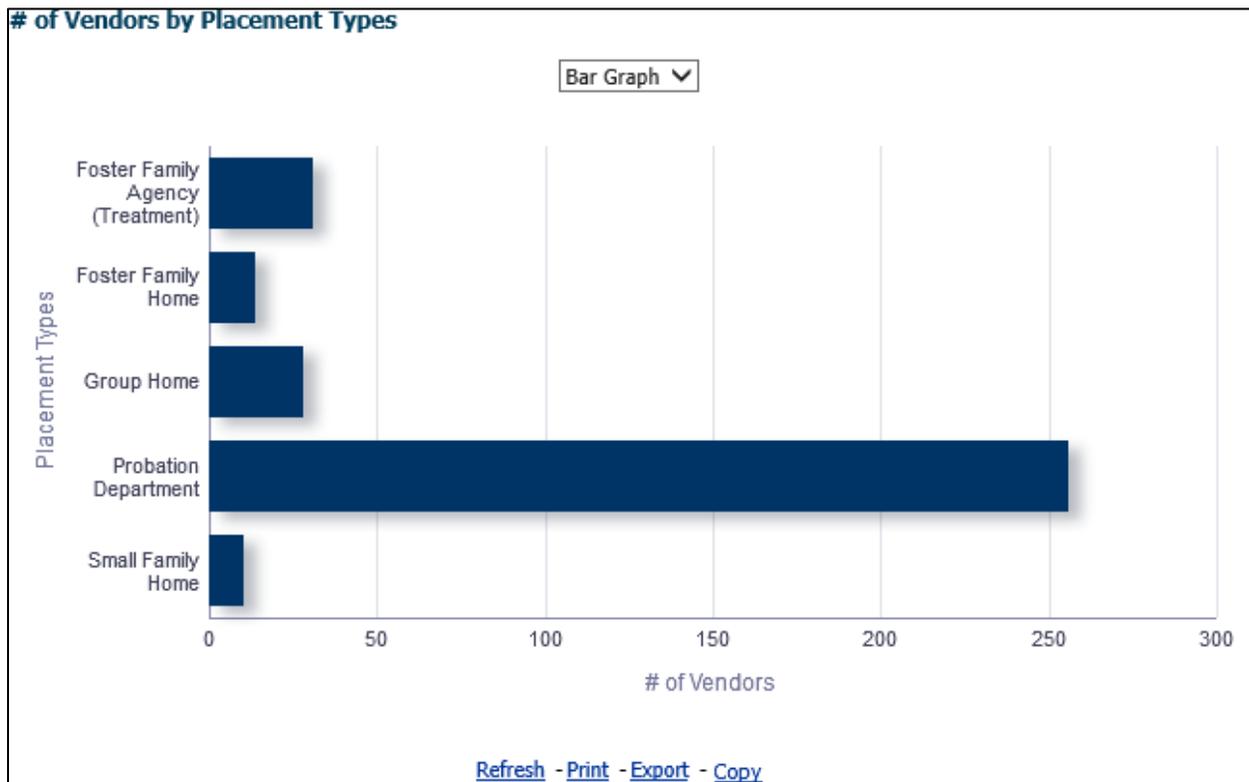
Figure 2.1.4.2.1-1 - # of Vendors by Placement Types – Bar Graph

Figure 2.1.4.2.1-2 - # of Vendors by Placement Types – Table

3. From the top-level 'Table' and 'Bar Graph' views, the widget will drill down to a second-level case list: Vendors by Placement Type - Case List.

2.1.4.2.2 # of Vendors without IDs

This widget will focus on data which does not have an existing Vendor ID, or a Vendor ID is not provided.

1. The widget will be a 'Bar Graph'
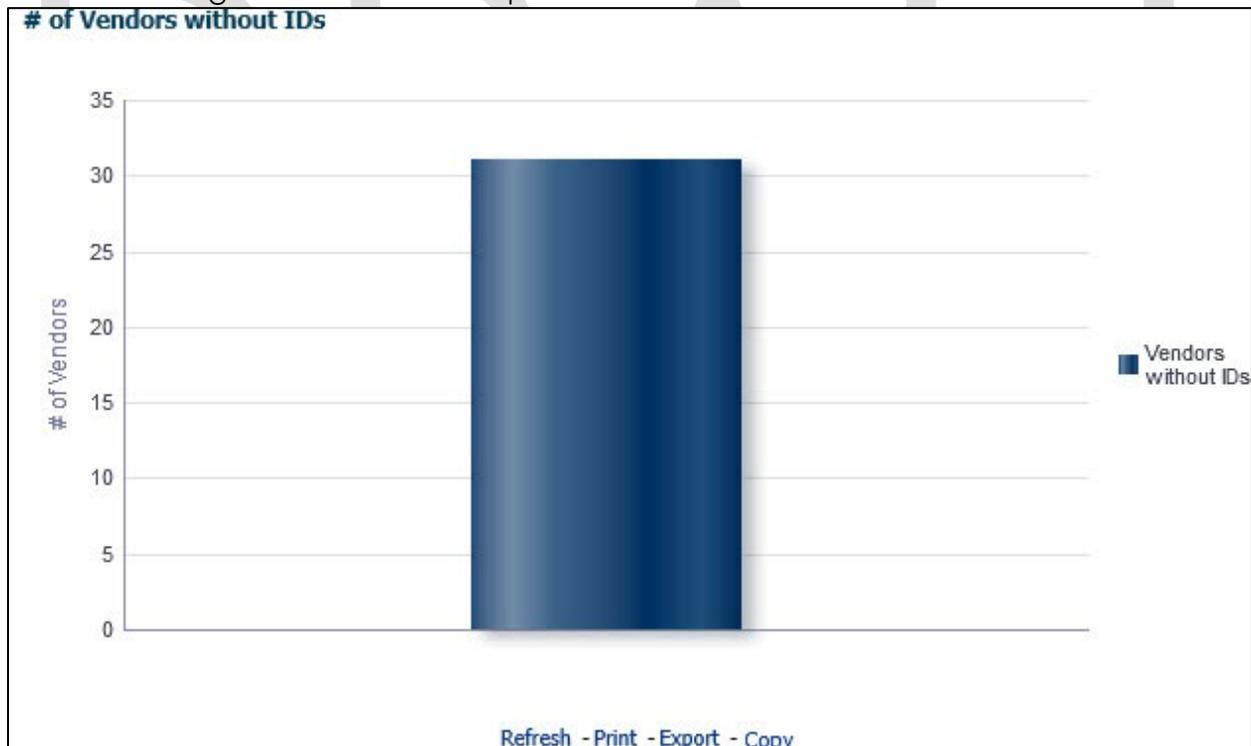
Figure 2.1.4.2.2-1 - # of Vendors without IDs – Bar Graph

2. From the top-level 'Bar Graph' view, the widget will drill down to a second-level case list: Vendors without IDs - Case List.

2.1.4.2.3 # of Exception Reasons Resolved

Widget shall display the total number of 'Exceptions' which have been resolved by a end user.

1. The widget shall toggle between 'Bar Graph' and 'Table'
    a. 'Bar Graph' view shall be the first to load by default and 'Table' view will be the second option.
2. The 'Bar Graph' and 'Table' shall display number of 'Resolved Exception Reasons' by each month when prompted by multiple months.
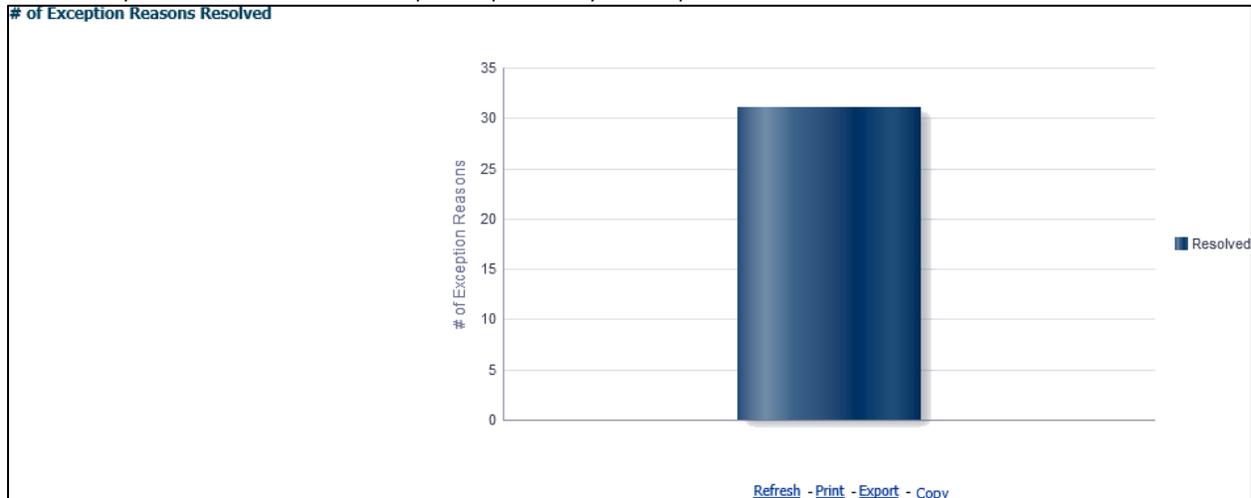
Figure 2.1.4.2.3 - # of Exception Reasons Resolved – Bar Graph

3. From the top-level 'Table' and 'Bar Graph' views, the widget will drill down to a second-level case list: Exception Reasons Resolved - Case List.

2.1.4.2.4 Exception Reason Transaction List

Widget shall display a list of all Vendor with flagged discrepancies between the CWS/CMS Interface and LRS System.

Table 5 - The logic of the Exception Reason Transaction List will be as follows:

Placement Vendor Exception Report	
Case List	**Addition**
Exception Reason Transaction List	**Add** "Case Number" – Case Number associated to a child placed with a vendor. **Add** "Vendor ID" – The unique ID for each vendor resource specified in the 'Foster Care Resource Databank Detail' page in the Application. **Add** "Program" – The Child Welfare 'Program' associated to a Case. **Add** "Vendor Name" – The name associated to a Vendor. This can be an individual or an agency. **Add** "Vendor Address" – The full address of a provider. The address must be as follows: Street Address, City, County, State, Zip Code.

Placement Vendor Exception Report	
Case List	**Addition**
	• **Add** "Vendor Phone" – The phone number of the provider. • **Add** "Vendor Type" – The vendor category type. (**Category ID = 10511**) • **Add** "Placement ID" – The unique identifier of Child Placement table. • **Add** "Placement Date" – Date on which a child was placed in care of a Vendor. • **Add** "Placement Type" – The 'Placement Type' associated to a Vendor. (**Category ID = 298**) **Note:** A single Vendor can have multiple placement types. • **Add** "Exception Reason" – The error thrown during inbound processing of the record. • **Add** "# of Days to Resolve" – Threshold for number of days in it takes a worker to resolve a vendor exception reason. The threshold will be as follows: 1 Day: Green (#00CC00) 2 Days: Yellow (#FFFF00) >= 3 Days: Red (#FF0000) **Note:** 1. Day 1 will start the day after the error is identified. Please see Appendix: Days to Resolve. 2. This number must be calculated with the Assumption that Create Date is day 0 and weekend and County Holidays are not counted.

Figure 2.1.4.2.4 – Exception Reason Transaction List

2. The top-level 'Table' will not drill down to a case list.

2.1.4.3 Case List

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

2.1.4.3.1 **Vendors by Placement Type - Case List**

Table 6 - The logic of the Vendors by Placement Type - Case List will be as follows:

Placement Vendor Exception Report	
Case List	**Addition**
Vendors by Placement Type - Case List	1. **Add** "Case Number" – Case Number associated to a child placed with a vendor. 2. **Add** "Vendor ID" – The unique 6 – digit CWS/CMS Vendor Number for each vendor resource specified in the 'Foster Care Resource Databank Detail' page in the Application. 3. **Add** "Program" – The Child Welfare 'Program' associated to a child's Case. 4. **Add** "Vendor Name" – The name associated to a Vendor. This can be an individual or an agency. 5. **Add** "Vendor Address" – The full address of a provider. The address must be as follows: Street Address, City, County, State, Zip Code. 6. **Add** "Vendor Phone" – The phone number of the provider. 7. **Add** "Vendor Type" – The vendor category type. (**Category ID = 10511**) 8. **Add** "Placement Date" – Date on which a child was placed in care of a Vendor. 9. **Add** "Placement Type" – The type of place associated to a Vendor in the 'Child Placement Detail' page in the Application. (**Category ID = 298**) **Note:** A single Vendor can have multiple placement types. 10. **Add** "Exception Reason" – The error thrown during inbound processing of the record.

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

Figure 2.1.4.3.1 – Vendors by Placement Type - Case List

2.1.4.3.2 Vendors without IDs - Case List

Table 7 - The logic of the Vendors without IDs - Case List will be as follows:

Placement Vendor Exception Report	
Case List	**Addition**
Vendors without IDs - Case List	1. **Add** "Case Number" – Case Number associated to a child placed with a vendor. 2. **Add** "Program" – The Child Welfare 'Program' associated to a child's Case. 3. **Add** "Vendor Name" – The name associated to a Vendor. This can be an individual or an agency. 4. **Add** "Vendor Address" – The full address of a provider. The address must be as follows: Street Address, City, County, State, Zip Code. 5. **Add** "Vendor Phone" – The phone number of the provider.

Placement Vendor Exception Report	
Case List	**Addition**
	6. **Add** "Vendor Type" – The vendor category type. (**Category ID = 10511**) 7. **Add** "Placement Date" – Date on which a child was placed in care of a Vendor. 8. **Add** "Placement Type" – The type of place associated to a Vendor in the 'Child Placement Detail' page in the Application. (**Category ID = 298**) **Note:** A single Vendor can have multiple placement types. 9. **Add** "Exception Reason" – The error thrown during inbound processing of the record.

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

Vendors without IDs - Case List

Case Number ▲▽	Program	Vendor Name	Vendor Address	Vendor Phone	Vendor Type	Placement Date	Placement Type	Exception Reason
XXXXXXX	AAP	Vendor Name 11	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/21/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 11	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/09/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 12	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/14/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 13	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/03/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 14	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/31/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 14	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/28/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 3.(	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/29/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 30	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/10/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 31	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/02/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 33	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/09/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 33	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/30/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 38	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/28/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 40	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/17/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 50	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/15/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 50	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/14/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 50	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/22/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 50	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/23/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 54	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/16/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 56	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/11/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 56	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/24/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 6	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/30/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 61	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/07/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 61	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/17/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 62	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/29/2016	Foster Family Agency (Treatment)	Invalid Value
XXXXXXX	AAP	Vendor Name 63	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/21/2016	Foster Family Agency (Treatment)	Invalid Value

Rows 1 - 25

From Month is greater than or equal to **01/2016**
and To Month is less than or equal to **03/2016**

Return - Refresh - Print - Export - Copy

Figure 2.1.4.3.2 – Vendors without IDs - Case List

2.1.4.3.3 Exception Reasons Resolved - Case List

Table 9 - The logic of the Exception Reasons Resolved - Case List will be as follows:

Placement Vendor Exception Report	
Case List	**Addition**
Exception Reasons Resolved - Case List	1. **Add** "Case Number" – Case Number associated to a child placed with a vendor. 2. **Add** "Vendor ID" – The unique 6 – digit CWS/CMS Vendor Number for each vendor resource specified in the 'Foster Care Resource Databank Detail' page in the Application. 3. **Add** "Program" – The Child Welfare 'Program' associated to a child's Case. 4. **Add** "Vendor Name" – The name associated to a Vendor. This can be an individual or an agency. 5. **Add** "Vendor Address" – The full address of a provider. The address must be as follows: Street Address, City, County, State, Zip Code. 6. **Add** "Vendor Phone" – The phone number of the provider. 7. **Add** "Vendor Type" – The vendor category type. (**Category ID = 10511**) 8. **Add** "Placement Date" – Date on which a child was placed in care of a Vendor. 9. **Add** "Placement Type" – The type of place associated to a Vendor in the 'Child Placement Detail' page in the Application. (**Category ID = 298**) **Note:** A single Vendor can have multiple placement types. 10. **Add** "Exception Reason" – The error thrown during inbound processing of the record.

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

Exception Reasons Resolved - Case List

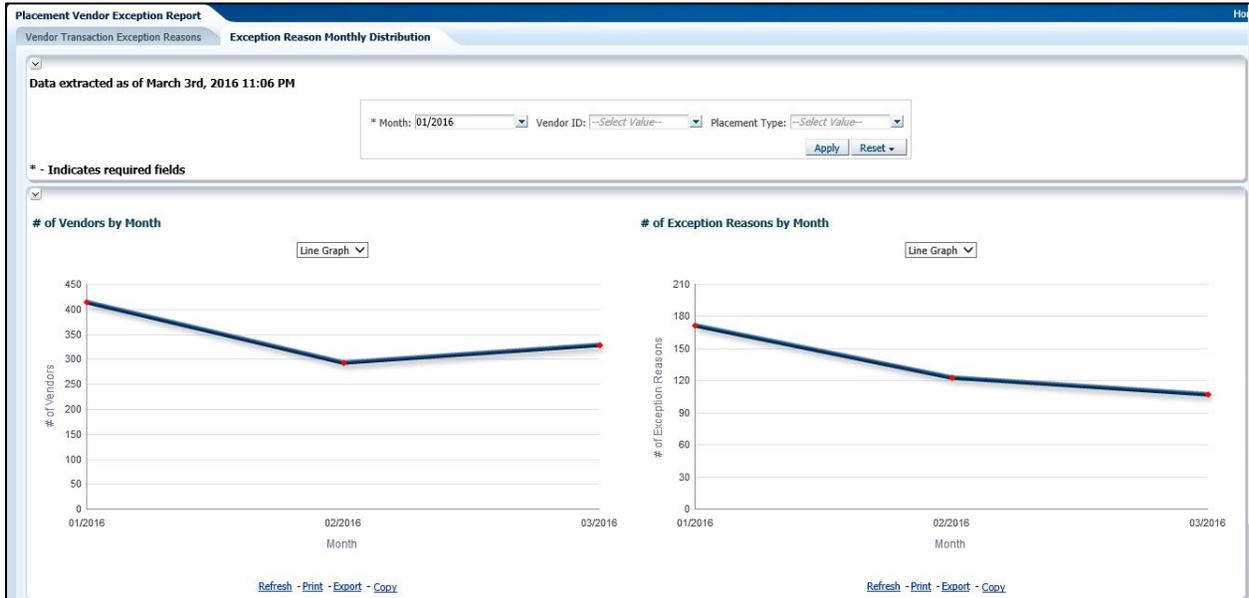| Case Number	Vendor ID	Program	Vendor Name	Vendor Address	Vendor Phone	Vendor Type	Placement Date	Placement Type	Exception Reason
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 1.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/07/2016	Probation Department	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 10.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/17/2016	Foster Family Home	Invalid Value
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 10.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/17/2016	Probation Department	No such vendor
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 100.0	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/16/2016	Probation Department	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 100.0	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/17/2016	Foster Family Agency (Treatment)	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 11.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/02/2016	Foster Family Home	Invalid Value
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 12.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/08/2016	Probation Department	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 12.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/09/2016	Group Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 13.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/01/2016	Small Family Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 15.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/07/2016	Probation Department	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 15.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/03/2016	Small Family Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 15.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/31/2016	Foster Family Agency (Treatment)	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 17.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/14/2016	Small Family Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 18.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/16/2016	Foster Family Agency (Treatment)	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 19.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/15/2016	Probation Department	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 19.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/25/2016	Foster Family Home	Invalid Value
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 19.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/28/2016	Group Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 2.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/08/2016	Small Family Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 21.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/10/2016	Small Family Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 21.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/22/2016	Foster Family Agency (Treatment)	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 22.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/08/2016	Group Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 23.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/21/2016	Group Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 24.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/14/2016	Foster Family Home	Invalid Value
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 25.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/28/2016	Group Home	Vendor is in an activated status/already allocated Vendor Number
XXXXXXX	Vendor ID	Kin-Gap	Vendor Name 26.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/07/2016	Probation Department	No such vendor

Rows 1 - 25

From Month is greater than or equal to **03/2016**
and To Month is less than or equal to **03/2016**

Return - Refresh - Print - Export - Copy

Figure 2.1.4.3.3 – Exception Reasons Resolved - Case List

2.1.5 Placement Vendor Exception Report – Exception Reason Monthly Distribution Page Layout

2.1.5.1 Prompt Detail

Table 10 – Prompt Description

Filter Name	Default Value	Filter Type
*Month	Current Month	Multi-select option to filter data by. The data will display as of the day a user is viewing the dashboard. See Assumptions for range limits.
Vendor ID	All	Multi-select option to filter data by 'Vendor ID'
Placement Type	All	Multi-select option to filter data by Child Welfare 'Placement Type'.

Note: * 'Month' filter is always required.

Table 11 - Logic for parameters will be as follows:

Dashboard Page	Parameters Addition	Parameter Description
Exception Reason Monthly Distribution	**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 "Vendor ID" dropdown prompt.	The values will be the 6 digit CMS/CWS Number in the Foster Care Resource Detail Page for all vendors.
	Add "Placement Type" dropdown prompt.	The values will be the types of institutions a child is placed.

2.1.5.2 Widget Details

2.1.5.2.1 # of Vendors by Month

Widget shall display the total number of Vendors by the prompted month(s).

1. The widget shall toggle between 'Bar Graph' and 'Table'
   a. 'Bar Graph' view shall be the first to load by default and 'Table' view will be the second option.
2. The 'Bar Graph' and 'Table' shall display # of Vendors by each month when prompted by multiple months.
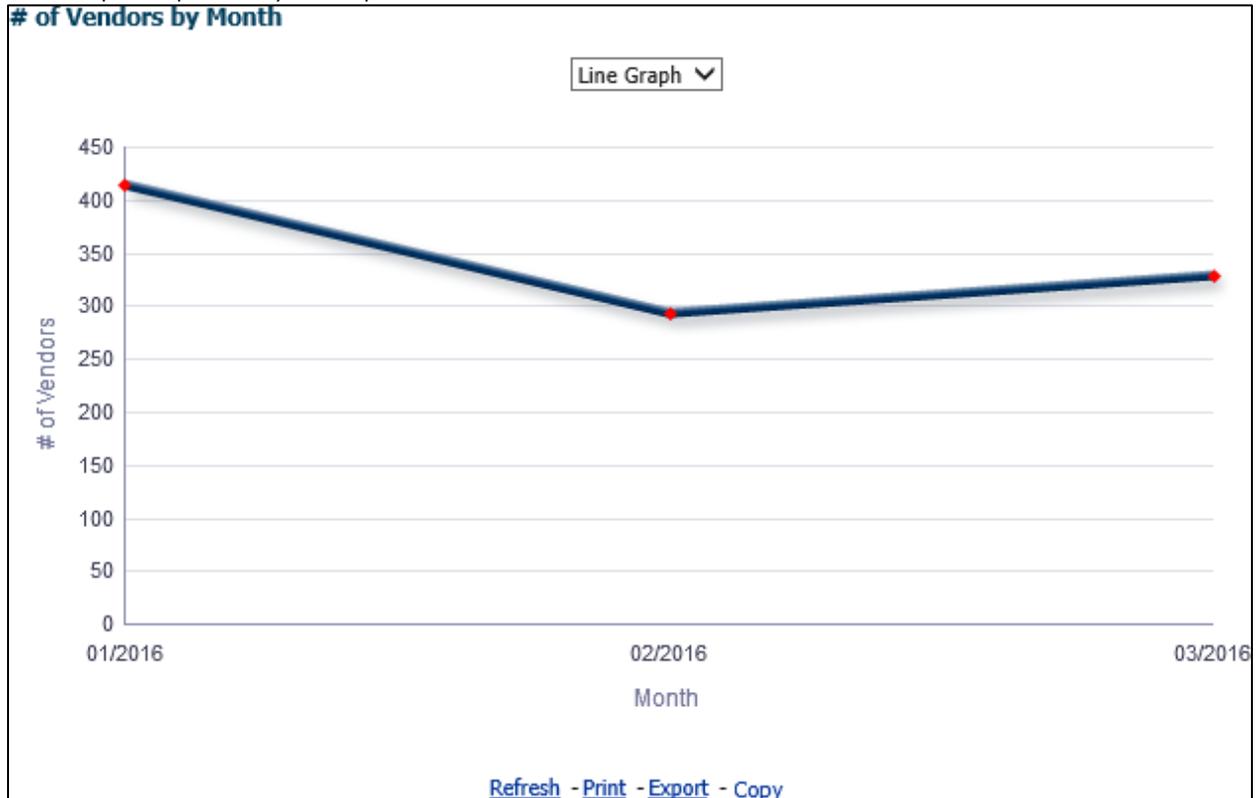
Figure 2.1.5.1-1 - # of Vendors by Month – Line Graph

Figure 2.1.5.1-2 - # of Vendors by Month – Table

3. From the top-level 'Table' and 'Bar Graph' views, the widget will drill down to a second-level case list: Vendors by Month - Case List.

2.1.5.2.2 # of Exception Reasons by Month

Widget shall display the total number of 'Exceptions' by the prompted month(s).

1. The widget shall toggle between 'Bar Graph' and 'Table'
    a. 'Bar Graph' view shall be the first to load by default and 'Table' view will be the second option.
2. The 'Bar Graph' and 'Table' shall display number of 'Exception Reasons' by each month when prompted by multiple months.

Figure 2.1.5.2-1 - # of Exception Reasons by Month – Line Graph

Figure 2.1.5.2-2 - # of Exception Reasons by Month – Table

3. From the top-level 'Table' and 'Bar Graph' views, the widget will drill down to a second-level case list: Exception Reasons by Month - Case List.

2.1.5.3 Case Lists

2.1.5.3.1 Vendors by Month - Case List

Table 12 - The logic of the Vendors by Month - Case List will be as follows:

Placement Vendor Exception Report	
Case List	**Addition**
Vendors by Month - Case List	1. **Add** "Case Number" – Case Number associated to a child placed with a vendor. 2. **Add** "Vendor ID" – The unique 6 – digit CWS/CMS Vendor Number for each vendor resource specified in the 'Foster Care Resource Databank Detail' page in the Application. 3. **Add** "Program" – The Child Welfare 'Program' associated to a child's Case. 4. **Add** "Vendor Name" – The name associated to a Vendor. This can be an individual or an agency. 5. **Add** "Vendor Address" – The full address of a provider. The address must be as follows: Street Address, City, County, State, Zip Code. 6. **Add** "Vendor Phone" – The phone number of the provider. 7. **Add** "Vendor Type" – The vendor category type. (**Category ID = 10511**) 8. **Add** "Placement Date" – Date on which a child was placed in care of a Vendor. 9. **Add** "Placement Type" – The type of place associated to a Vendor in the 'Child Placement Detail' page in the Application. (**Category ID = 298**) **Note:** A single Vendor can have multiple placement types. 10. **Add** "Exception Reason" – The error thrown during inbound processing of the record.

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

Figure 2.1.5.3.1 – Vendors by Month - Case List

2.1.5.3.2 Exception Reasons by Month - Case List

Table 13 - The logic of the Exception Reasons by Month - Case List will be as follows:

Placement Vendor Exception Report	
Case List	**Addition**
Exception Reasons by Month - Case List	1. **Add** "Case Number" – Case Number associated to a child placed with a vendor. 2. **Add** "Vendor ID" – The unique 6 – digit CWS/CMS Vendor Number for each vendor resource specified in the 'Foster Care Resource Databank Detail' page in the Application. 3. **Add** "Program" – The Child Welfare 'Program' associated to a child's Case. 4. **Add** "Vendor Name" – The name associated to a Vendor. This can be an individual or an agency. 5. **Add** "Vendor Address" – The full address of a provider. The address must be as follows: Street Address, City, County, State, Zip Code. 6. **Add** "Vendor Phone" – The phone number of the provider.

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Placement Vendor Exception Report	
Case List	**Addition**
	7. **Add** "Vendor Type" – The vendor category type. (**Category ID = 10511**)
	8. **Add** "Placement Date" – Date on which a child was placed in care of a Vendor.
	9. **Add** "Placement Type" – The type of place associated to a Vendor in the 'Child Placement Detail' page in the Application. (**Category ID = 298**)

Note: A single Vendor can have multiple placement types. |
| | 10. **Add** "Exception Reason" – The error thrown during inbound processing of the record. |

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

Figure 2.1.5.3.2 – Exception Reasons by Month - Case List

2.2 General OBIEE function Mockups

2.2.1 Drill links

1. A popup link to the drill down options will be available when there is a second level widget or case list is available.
2. When a graph and case list are both drill down options, the graph option shall be the first selectable option and case list will be the last.
3. Case Numbers in case lists will link back to the to the Application.
    a. A popup link will appear when a case number is selected
    b. The link, Navigate to Case Summary page, will link back to the Case Summary page of the case number
4. Vendor IDs in case lists will link back to the Application.
    a. A popup link will appear when a Vendor number is selected
    b. The link, Navigate to Foster Care Resource Search page, will link back to the Foster Care Resource Search of the Vendor Number
        i. The vendor number will be listed in the Search Results Summary section of the Foster Care Resource Search page
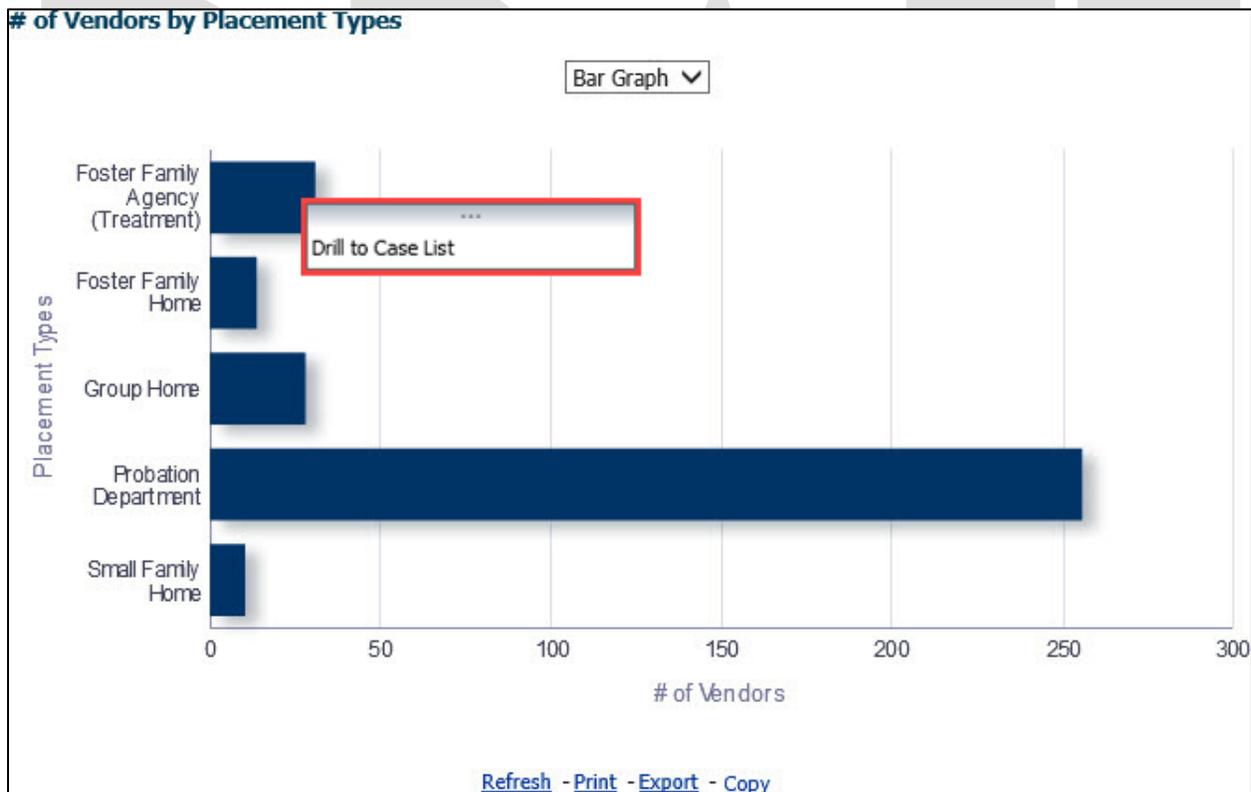

Figure 2.3.1-1 – Drill down link list

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	Vendor ID	Program	Vendor Name	Vendor Address	Vendor Phone	Vendor Type	Placement Date	Placement Type	Exception Reason
XXXXXXX	Vendor ID	AAP	Vendor Name 1.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/10/2016	Probation Department	Invalid Value
XXXXXXX	⚙ Navigate to Case Summary page			Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/24/2016	Probation Department	Invalid Value
XXXXXXX	Vendor ID	AAP	Vendor Name 10.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/14/2016	Foster Family Home	Invalid Value
XXXXXXX	Vendor ID	AAP	Vendor Name 100.0	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/03/2016	Probation Department	Invalid Value
XXXXXXX	Vendor ID	AAP	Vendor Name 11.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/24/2016	Foster Family Agency (Treatment)	Invalid Value

Figure 2.3.1-2- Case Number to LRS South Summary page link

Case Number	Vendor ID	Program	Vendor Name	Vendor Address	Vendor Phone	Vendor Type	Placement Date	Placement Type	Exception Reason
XXXXXXX	Vendor ID	AAP	Vendor Name 1.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/10/2016	Probation Department	Invalid Value
XXXXXXX	Ven ⚙ Navigation to Foster Care Resource Se...			City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/24/2016	Probation Department	Invalid Value
XXXXXXX	Vendor ID	AAP	Vendor Name 10.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/14/2016	Foster Family Home	Invalid Value
XXXXXXX	Vendor ID	AAP	Vendor Name 100.0	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Business	03/03/2016	Probation Department	Invalid Value
XXXXXXX	Vendor ID	AAP	Vendor Name 11.00	Street Address, City, CA, Zip Code	XXX-XXX-XXXX	Individual	03/24/2016	Foster Family Agency (Treatment)	Invalid Value

Figure 2.3.1-3- Vendor ID to Foster Care Resource Search 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: Placement Vendor Exception Report

Dashboard Pages: Vendor Transaction Exception Reasons and Exception Reason Monthly Distribution

Dashboard Description: The Placement Vendor Exception Report dashboard page provides details on the number of Vendors flagged with an Exception Reason. The dashboard allows the ability to break down Vendors by 'Program', 'Placement Type', as well as identify Vendor information without received without Vendor IDs

Execution Frequency: Nightly Batch
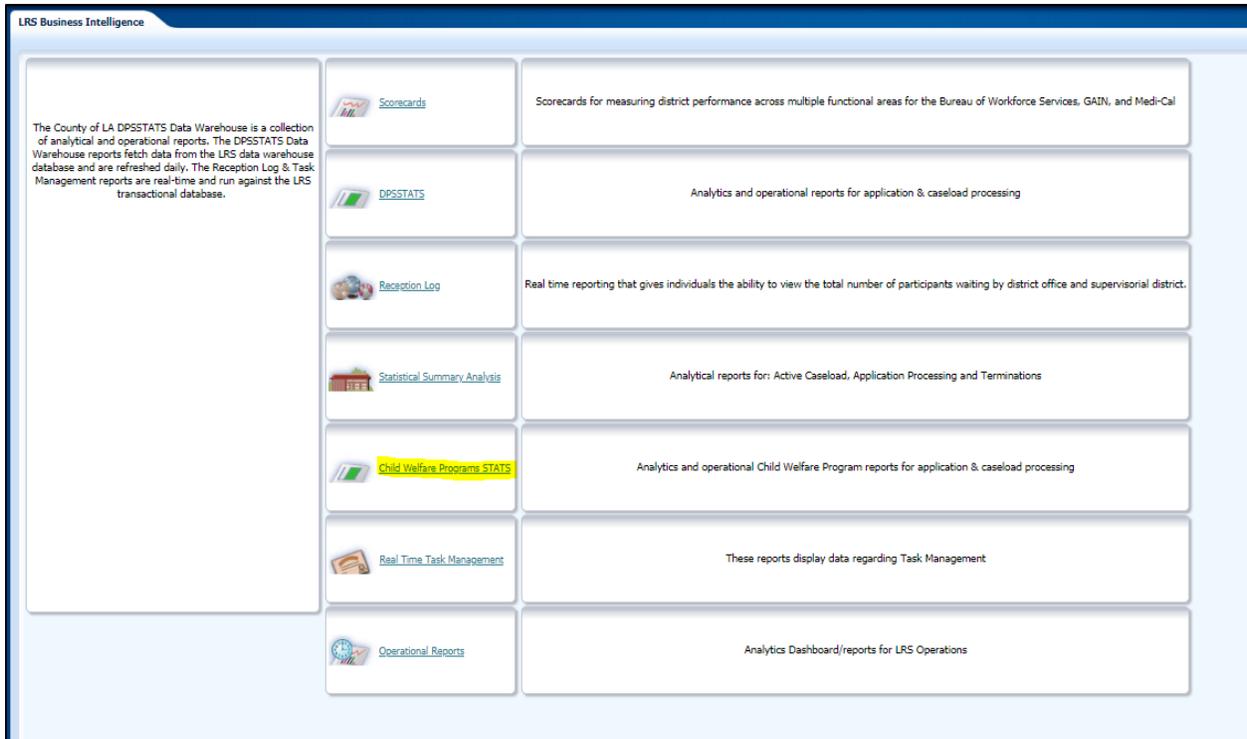
Figure 2.3-1 – Landing Page

Figure 2.3-2 – Report Navigation

2.4   Report and Data Level Security

The Placement Vendor Exception Report dashboard will only be visible to users who have the **CWS BI Vendor Exception Role** security role associated to their security profile. If user only has the **CWS BI Vendor Exception Role**, all other dashboards will not be visible without proper rights. The **CWS BI Vendor Exception Role** security role will be tied to the security group called **CWS BI Consumer**. County Security Administrators will be responsible for providing both the **CWS BI Consumer** security group and **CWS BI Vendor Exception Role** security role to the appropriate users.

Figure 2.4-1 – Table of Contents with CWS BI Consumer Role

Figure 2.4-2 – Table of Contents with only CWS BI Vendor Exception Role

2.5 ETL Dependencies

A new load plan and batch jobs will be created. The batch job will kick off 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 2.3 Report Navigation for Placement Vendor Exception Report.

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.

2.9 Batch

2.9.1 Create a new reporting table for DCFS transaction error messages

2.9.1.1 Overview

Create a new database reporting table for the Placement Vendor Exception Report to retain the outgoing exceptions when processing the DCFS Inbound file from DataMart/DCFS.

2.9.1.2 Description of Changes

The following new elements will be stored in the new reporting table:

1. Transact Text
2. Error Code
3. Error Message
4. Created on
5. Updated on
6. Created by
7. Updated by
8. Program Code
9. Batch Date
10. CWS/CMS Case ID
11. Vendor ID
12. Org Reference ID

Note: The data in the new table will include all the error transactions and is not limited to vendor specific errors.

2.9.2 Update Foster Care, KinGap, and Adoption Assistance Program inbound reader

2.9.2.1 Overview

DCFS Data Mart sends information from CWS/CMS to LRS for creation and maintenance of Foster Care, Kin-GAP, and Adoption Assistance Programs. Inbound Files from DCFS are then loaded into LRS and processed by the inbound reader batch jobs and any transaction that cannot be processed are exception out to protect case data integrity in LRS.

2.9.2.2 Description of Change

Currently, any transaction received in the inbound file that cannot be processed by the inbound reader will exception out and exception details are temporarily stored in database that is erased once an outbound file has been generated.

With this SCR, the Inbound readers for FC, KG, AAP will process the inbound files from DCFS data mart and parse the exception data to the new reporting table that contains elements such as Vendor ID, CWS/CMS Case ID, Org Reference ID. These 3 elements are conditionally required based on the transaction type for the Placement Vendor Exception Report.

The data stored in the new reporting table will be available for 90 days and will later be deleted.

2.9.3 Data Cleanup for the new reporting table

2.9.3.1 Overview

The data in the new reporting table being introduced as part of this SCR will be available for 90 days and will later be deleted.

2.9.3.2 Description of Change

Data in the new reporting table will be deleted if the create date of the transaction/record in the table is over 90 days.

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 50808 - Security Matrix.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.4.4.2.20(a)(b)	The LRS shall utilize industry standard packages and applications for the extraction and processing of LRS Data from the LRS databases, including: • 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 Days to Resolve

Error Identified	Days to resolve calculation	Description
03/02/2016	Start counting on: 03/03/2016 = Day 1 If exception is still unresolved by 03/04/2016 = Day 2 If exception is still unresolved by 03/07/2016 or later = Day 3 or more	The error is identified on 03/02/2016. 1. If the exception is still unresolved by 03/03/2016, then the number of days to resolved will be 1. 2. If the exception is still unresolved by 03/04/2016, then the number of days to resolved will be 2. 3. If the exception is still unresolved by 03/07/2016 or later, then the number of days to resolved will be 3 or more. a. Since 03/05/2016 and 03/06/2016 are Saturday and Sunday respectively, these days will not be counted.
03/04/2016	Start counting on: 03/07/2016 = Day 1 If exception is still unresolved by 03/08/2016 = Day 2 If exception is still unresolved by 03/09/2016 or later = Day 3 or more	The error is identified on 03/04/2016. 1. If the exception is still unresolved by 03/07/2016, then the number of days to resolved will be 1. a. Since 03/05/2016 and 03/06/2016 are Saturday and Sunday respectively, these days will not be counted. 2. If the exception is still unresolved by 03/08/2016, then the number of days to resolved will be 2. 3. If the exception is still unresolved by 03/09/2016 or later, then the number of days to resolved will be 3 or more.

Error Identified	Days to resolve calculation	Description
07/01/2016	Start counting on: 07/05/2016 = Day 1 If exception is still unresolved by 07/06/2016 = Day 2 If exception is still unresolved by 07/07/2016 or later = Day 3 or more	The error is identified on 07/01/2016. 1. If the exception is still unresolved by 07/05/2016, then the number of days to resolved will be 1. a. Since 07/02/2016, 07/03/2016 and 07/04/2016 are Saturday, Sunday and July 4th holiday respectively, these days will not be counted. 2. If the exception is still unresolved by 07/06/2016, then the number of days to resolved will be 2. 3. If the exception is still unresolved by 07/07/2016 or later, then the number of days to resolved will be 3 or more.

CalACES

CALIFORNIA AUTOMATED CONSORTIUM ELIGIBILITY SYSTEM

Design Document

CA-201021

Update Targeted Low-Income Search Page to Default the 'Type' and 'Status' fields to "Blank"

DRAFT

Table of Contents

1   OVERVIEW

The purpose of this document is to satisfy an enhancement to the LRS Targeted Low-Income Search page. The 'Type' and 'Status' fields will default to "Blank" for improved page loading performance when C-IV migrates to LRS due to a large number of Targeted Low-Income records in the C-IV counties. The page will load without Targeted Low-Income records in the search results and only display records when the Worker makes a selection. The option "All" will be removed from both the 'Type' and 'Status' drop-down lists to facilitate more selective searches that will decrease the search volume and improve the search performance.

1.1   Current Design

The LRS Targeted Low-Income Search Page defaults the 'Type' and 'Status' fields to "All" when the page loads. LRS does not have any Targeted Low-Income records. There are a large number of Targeted Low-Income records in C-IV counties.

1.2   Requests

Update the LRS Targeted Low-Income Search page to default the 'Type' and 'Status' drop-down lists to "Blank" in order to prepare for a large number of records when C-IV migrates and merges with LRS as one system. Remove the option "All" from both the 'Type' and 'Status' drop-down lists to decrease the search volume and improve the search performance.

1.3   Overview of Recommendations

1. Update the Targeted Low-Income Search page to default the 'Type' and Status fields to "Blank" on page load.
2. Remove the option "All" from both the 'Type' and 'Status' drop-down lists. The search volume will decrease resulting in improved search performance. The Worker can select the desired status from the drop-downs to specify search criteria.

2   RECOMMENDATIONS

2.1   Targeted Low-Income Search Page

2.1.1   Overview

Update the Targeted Low-Income Search page to default the 'Type' and 'Status' to "Blank" on page load. All fields on page will default to "Blank" on page load. Search will not take place on page load. The search will only happen when the Worker makes selection and clicks the Search button. Remove the option "All" from both the 'Type' and 'Status' drop-down lists.

2.1.2 Targeted Low-Income Search Mockup

Figure 2.1.1 – Targeted Low-Income Search

Figure 2.1.2 – Targeted Low-Income Search

Figure 2.1.3 – Targeted Low-Income Search

2.1.3 Description of Changes

1. Update the page to default the 'Type' field to "Blank" when the page loads.
2. Update the page to default the 'Status' field to "Blank" when the page loads.
3. Update the page to remove option "All" from both the 'Type' and 'Status' drop-down lists.

2.1.4 Page Location

Global: Case Info

Local: e-Tools

Task: External Agencies > Targeted Low-Income

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.5.2.12	The LRS shall allow COUNTY-specified Users to view files and LRS Data received through interfaces in a user-friendly and easily understood format.	Targeted Low-Income Search page will be updated in LRS to: 1. Have a default Type and Status fields of "Blank" on page load. Page will load successfully when C-IV migrates. 2. Not to have option "All" in both Type and Status drop-down lists. Search volume will decrease resulting in improved search speed.

DRAFT