



California Statewide Automated Welfare System

Design Document

CA-207322 DDID 1428 -

Update Program drop down values on Create
QA/QC Batch

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/8/2019	0.1	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

The Program dropdown on the current Create QA/QC Batch page contains values for "NACF", "PACF" and "In Home Supportive Services (IHSS)". When CalFresh is picked as the program the Expedited Services drop down will display.

1.2 Requests

The request is to update the values as follows:

1. Remove the "NACF" value from the "Program" field
2. Remove the "PACF" value from the "Program" field
3. Relabel the value "Expedited Services" to "Expedited Service" on the program dropdown field
4. Relabel the value "In Home Supportive Services (IHSS)" to "IHSS/CMIPS II" on the program dropdown field

1.3 Overview of Recommendations

Create a new reference table for CATGRY_ID 18 to update the values as described above.

Relabel the conditional drop down "Expedited Services" to "Expedited Service"

1.4 Assumptions

The removed values will be removed only from display on the create QA/QC Batch page. The relabeling will not affect the underlying code value.

2 RECOMMENDATIONS

2.1 Create QA/QC Batch

2.1.1 Overview

The changes include code table and reference table changes. The page will list the new values in the same order.

The conditional dropdown that shows up when CalFresh is selected at the program will be relabeled from Expedited Services to Expedited Service.

2.1.2 Create QA/QC Batch Mockup

Quality Review

QR Search

QA/QC Batch

QA Sample Search

Home Call Referral

Assigned Cases

Create QA/QC Batch

*- Indicates required fields

Save Cancel

Batch Name:

Batch Name: *

Select From:

Organizational Level :

Office: Unit: Position: Add

-Select Office- - - - -

Quantity:

Quality Review Type: *

- Select -

Audit Type: *

- Select -

Program: *

- Select -

- General Assistance/General Relief
- Homeless
- Homeless - Perm
- Homeless - Temp
- IV-D Child Support
- Immediate Need
- IHSS/CMIPS II
- Kin-GAP**
- LIHP
- Linkages Adult Services
- Medi-Cal
- Multipurpose Senior Services
- Nutrition Benefit
- Other County
- PCSP
- RCA
- REP
- SSI Only
- SSI/SSP
- SSP Only

Primary Number or Percent of Cases: *

- - - - - %

Secondary Number or Percent of Cases:

- - - - - %

Sample Month: *

- - - - -

Redetermination Month:

- - - - -

Program Status: *

- Select -

- Active
- Deferred
- Denied

☐ Withdrawal

Status End:

- - - - -

Assign To:

Figure 2.1.1 – Create QA/QC Batch

Quality Review QR Search QA/QC Batch QA Sample Search Home Call Referral Assigned Cases	Create QA/QC Batch		
	*- Indicates required fields <input type="button" value="Save"/> <input type="button" value="Cancel"/> 		
	Batch Name: Batch Name: * <input type="text"/>		
	Select From: Organizational Level : Office: <input type="text" value="-Select Office-"/> Unit: <input type="text"/> Position: <input type="text"/> <input type="button" value="Add"/>		
	Quantity: Quality Review Type: * <input type="text" value="- Select -"/>		
	Audit Type: * <input type="text" value="- Select -"/>		
Program: * <input type="text" value="CalFresh"/>			
Assistance Type: <input type="text"/>			
Primary Number or Percent of Cases: * <input type="text"/> %			
Secondary Number or Percent of Cases: <input type="text"/> %			
Sample Month: * <input type="text"/> <input type="button" value="Calendar"/>			
Expedited Service: <input type="text"/>			

Figure 2.1.2 Create QA/QC Batch

2.1.3 Description of Changes

Modify the code table and reference table to change the values as follows:

- 1) Remove the "NACF" value from the "Program" field
- 2) Remove the "PACF" value from the "Program" field
- 3) Relabel the value " In Home Supportive Services (IHSS) " to "IHSS/CMIPS II" on the program dropdown field

Change the conditional dropdown label of Expedited Services to be Expedited Service. This dropdown will appear when CalFresh is selected as the Program in the Program drop down.

2.1.4 Page Location

Global: Special Units
Local: Quality Review
Task: QA/QC Batch

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1428	<p>Original:</p> <p>The CONTRACTOR shall update the Create QA/QC Batch page as follows:</p> <ol style="list-style-type: none">1) Remove the "NACF" value from the "Program" field2) Remove the "PACF" value from the "Program" field3) Relabel the value "Expedited Services" to "Expedited Service" on the program dropdown field4) Relabel the value "IHSS" to "IHSS/CMIPS II" on the program dropdown field <p>Revised:</p> <p>The CONTRACTOR shall update the Create QA/QC Batch page as follows:</p> <ol style="list-style-type: none">1) Remove the "NACF" value from the "Program" field2) Remove the "PACF" value from the "Program" field3) Relabel the value "Expedited Services" to "Expedited Service" on the program dropdown field4) Relabel the value "In Home Supportive Services (IHSS)" to "IHSS/CMIPS II" on the program dropdown field		CTCR to update the values



California Statewide Automated Welfare System

Design Document

CA-207323: DDID 1398, 1408, 1425, 1519

Update Audit Type values for Quality Review
pages

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	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

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4/8/2019	0.1	Initial Draft	Avi Bandaranayake
7/29/2019	0.2	Updated based on Deliverable comments to combine DDID's 1398, 1408, 1425, 1519 into CA-207323	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

The Audit Type dropdown is available on the following pages:

- Create QA/QC Batch
- Quality Review Search
- Quality Review Detail
- Quality Assurance Random Sample Search

All pages contain values for "Approved" and "General Relief".

1.2 Requests

The request is to update the values as follows for all the pages:

- "Approved" to "Approved/Continuing"
- "General Relief" to "General Assistance/General Relief"

1.3 Overview of Recommendations

Modify the appropriate code table to update the values as needed. Modify the values "Approved" to "Approved/Continuing", and "General Relief" to "General Assistance/General Relief" using the CATGRY_ID 396. Include begin date and end date as appropriate.

1.4 Assumptions

There are no frontend changes related with this change.

2 RECOMMENDATIONS

2.1 Create QA/QC Batch

2.1.1 Overview

This page allows the user to create and schedule a batch job that will find cases based on the selected criteria and then assign the cases for review.

2.1.2 Create QA/QC Batch Mockup

The screenshot shows a web application interface for creating a QA/QC batch. On the left is a sidebar with a menu containing 'QA/QC Batch', 'QA Sample Search', 'Home Call Referral', and 'Assigned Cases'. The main area is titled 'Batch Name:' and contains several form fields. A dropdown menu is open for the first field, showing a list of options including 'Approved/Continuing', 'CalFresh Payment Accuracy QA', 'CalFresh Payment Accuracy QC', 'Case and Procedural Error Rate (CAPER)', 'Countywide Audit - Aided Persons', 'Countywide Audit - CalWORKS Child Support', 'Countywide Audit - CalWORKS/Gain Good Cause', 'General Assistance/General Relief', 'Homeless', 'Intake', 'MGO Countywide Single Audit', 'Medi-Cal Application', 'Medi-Cal Negative', 'Medi-Cal Redetermination', 'New Approvals', 'New Denials', and 'Special'. Below this is a 'Program:' field with a dropdown menu. To the right of the dropdown is a 'Position:' field with a dropdown menu and an 'Add' button. Below the 'Program:' field is an 'Aid Code:' field with a dropdown menu showing options '01 - RCA', '02 - RMA/EMA', and '03 - AAP-Fed'. To the right of the 'Aid Code:' field is a 'Primary Number or Percent of Cases:' field with a percentage icon. Below this is a 'Secondary Number or Percent of Cases:' field with a percentage icon. To the right of the 'Secondary Number or Percent of Cases:' field is a 'Sample Month:' field with a calendar icon. Below this is a 'Redetermination Month:' field with a calendar icon.

Figure 2.1.1 – 2.1.2 Create QA/QC Batch

2.1.3 Description of Changes

Modify the code table to change the values as follows:

- "Approved" to "Approved/Continuing"
- "General Relief" to "General Assistance/General Relief"

2.1.4 Page Location

Global: Special Units

Local: Quality Review

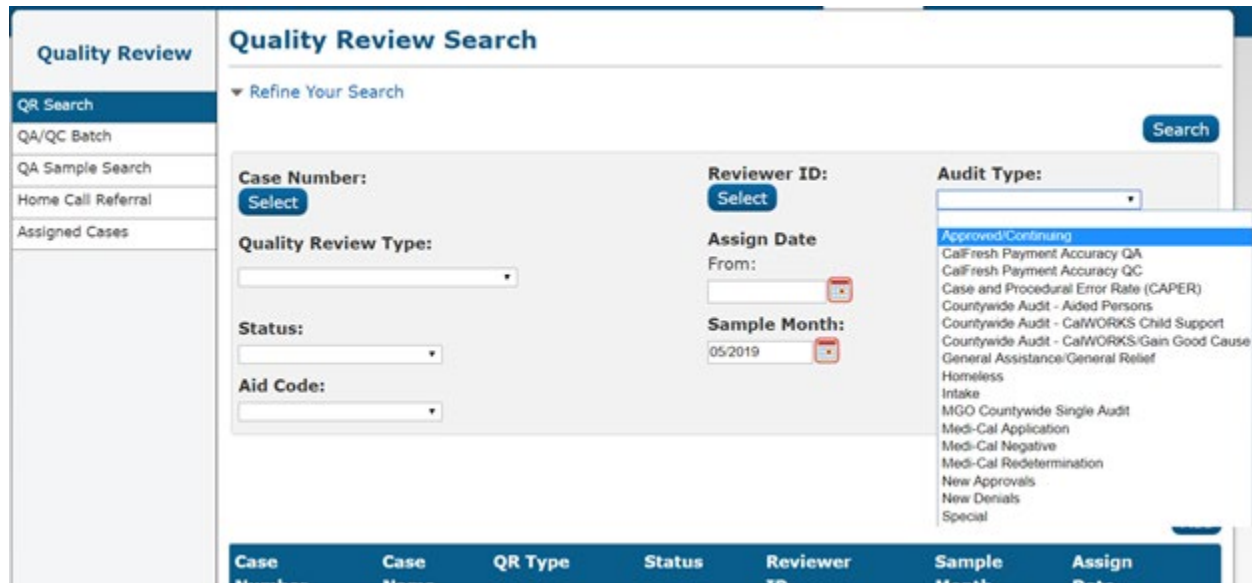
Task: QA/QC Batch

2.2 Quality Review Search

2.2.1 Overview

The Quality Review Search page allows the user to search for a Quality Review record that was created in the system, either manually or via batch.

2.2.2 Quality Review Search Mockup



The mockup shows a web interface for 'Quality Review Search'. On the left is a sidebar with a 'Quality Review' header and a list of links: 'QR Search' (highlighted), 'QA/QC Batch', 'QA Sample Search', 'Home Call Referral', and 'Assigned Cases'. The main content area has a 'Quality Review Search' title and a 'Refine Your Search' section. This section contains several search criteria: 'Case Number' with a 'Select' button, 'Reviewer ID' with a 'Select' button, 'Audit Type' with a dropdown menu (showing a list of audit types), 'Quality Review Type' with a dropdown, 'Assign Date' with a 'From' date field, 'Sample Month' with a date field (showing '05/2019'), 'Status' with a dropdown, and 'Aid Code' with a dropdown. A 'Search' button is located in the top right of the search area. At the bottom, there is a table header with columns: 'Case Number', 'Case Name', 'QR Type', 'Status', 'Reviewer ID', 'Sample Month', and 'Assign Date'.

Case Number	Case Name	QR Type	Status	Reviewer ID	Sample Month	Assign Date
-------------	-----------	---------	--------	-------------	--------------	-------------

Figure 2.2.2 – QR Search

2.2.3 Description of Changes

Modify the code table to change the values as follows:

- "Approved" to "Approved/Continuing"
- "General Relief" to "General Assistance/General Relief"

2.2.4 Page Location

Global: Special Units

Local: Quality Review

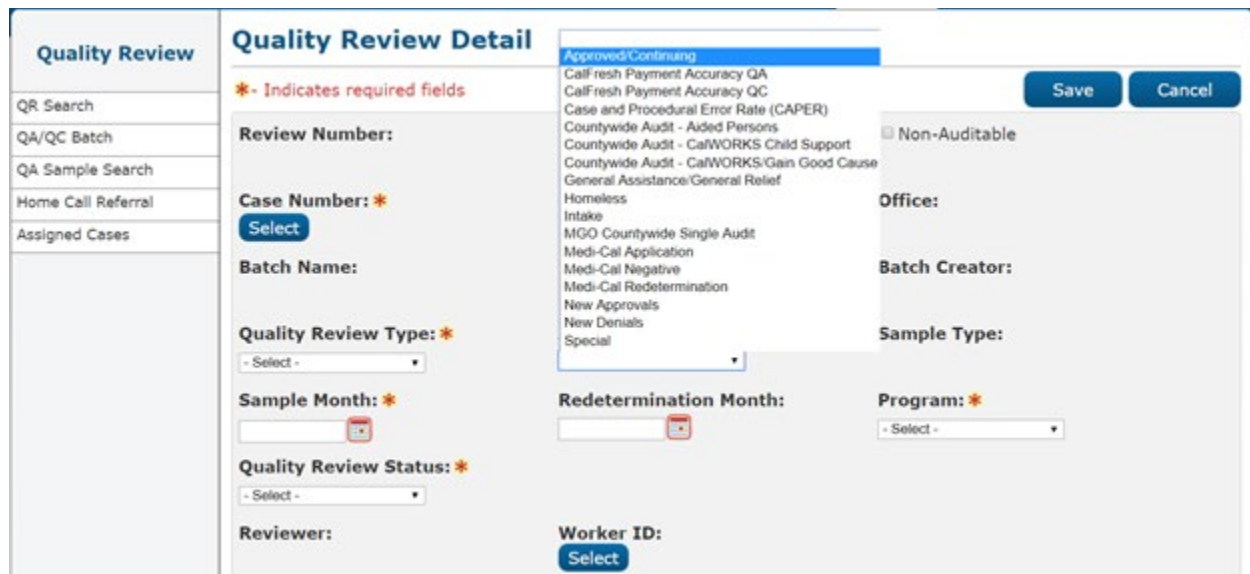
Task: QR Search

2.3 Quality Review Detail

2.3.1 Overview

The Quality Review Detail page allows the user to manually add a Quality Review to a case, in addition to worker assignment and findings.

2.3.2 Quality Review Detail Mockup



The mockup shows a web interface for 'Quality Review Detail'. On the left is a sidebar with a 'Quality Review' header and a list of links: 'QR Search', 'QA/QC Batch', 'QA Sample Search', 'Home Call Referral', and 'Assigned Cases'. The main area has a title 'Quality Review Detail' and a red asterisk note: '*- Indicates required fields'. The form contains several fields: 'Review Number:' (text input), 'Case Number: *' (with a 'Select' button), 'Batch Name:' (text input), 'Quality Review Type: *' (dropdown menu), 'Sample Month: *' (calendar icon), 'Quality Review Status: *' (dropdown menu), 'Reviewer:' (text input), 'Worker ID:' (with a 'Select' button), 'Redetermination Month:' (calendar icon), 'Program: *' (dropdown menu), and a 'Quality Review Type' dropdown menu with options: 'Approved/Continuing', 'CalFresh Payment Accuracy QA', 'CalFresh Payment Accuracy QC', 'Case and Procedural Error Rate (CAPER)', 'Countywide Audit - Aided Persons', 'Countywide Audit - CalWORKS Child Support', 'Countywide Audit - CalWORKS/Gain Good Cause', 'General Assistance/General Relief', 'Homeless', 'Intake', 'MGO Countywide Single Audit', 'Medi-Cal Application', 'Medi-Cal Negative', 'Medi-Cal Redetermination', 'New Approvals', 'New Denials', and 'Special'. There is also a 'Non-Auditable' checkbox. At the top right are 'Save' and 'Cancel' buttons. The 'Office:' and 'Batch Creator:' fields are empty.

Figure 2.3.2 – QR detail

2.3.3 Description of Changes

Modify the code table to change the values as follows:

- "Approved" to "Approved/Continuing"
- "General Relief" to "General Assistance/General Relief"

2.3.4 Page Location

Global: Special Units

Local: Quality Review

Task: QR Search

2.4 Quality Assurance Random Sample Search

2.4.1 Overview

On the Quality Assurance Random Sample Search page, the user can filter various search results. The Audit Type dropdown allows the user to select a specific audit type to filter the search results by.

The page is used to initiate a random search for QA/QC cases based on selected criteria.

2.4.2 Quality Assurance Random Sample Search Mockup

Figure 2.4.2 – QA Random sample Search

2.4.3 Description of Changes

Modify the code table to change the values as follows:

- "Approved" to "Approved/Continuing"
- "General Relief" to "General Assistance/General Relief"

2.4.4 Page Location

Global: Special Units

Local: Quality Review

Task: QA Sample Search

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1398	The CONTRACTOR shall update the following values in the "Audit Type" dropdown field on the Quality Review Search page: 1) Relabel Approved to Approved/Continuing 2) Relabel General Relief to General Assistance/General Relief		CTCR to change display values
1408	The CONTRACTOR shall update the following dropdown values in the "Audit Type" field on the Quality Review Detail page: 1) Relabel Approved to Approved/Continuing 2) Relabel General Relief to General Assistance/General Relief		CTCR to change display values
1425	The CONTRACTOR shall update the following values in the "Audit Type" dropdown field on the Create QA/QC Batch page: 1) Relabel Approved to Approved/Continuing 2) Relabel General Relief to General Assistance/General Relief		CTCR to change display values
1519	The CONTRACTOR shall relabel the following values in the "Audit Type" dropdown field on the Quality Assurance Random Sample Search page: 1) Approved to Approved/Continuing 2) General Relief to General Assistance/General Relief		CTCR to change display values



California Statewide Automated Welfare System

Design Document

SCR 207324 – Update the Case Review List Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Munce
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/03/2019	1.0	Initial Revision	Brian Munce
6/05/2019	1.1	Added updates for the Case Review List page's validations	Brian Munce
6/26/2019	1.2	Added extra assumption	Brian Munce

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1 OVERVIEW

1.1 Current Design

The Case Review List page displays a list of case reviews associated with the quality review case.

1.2 Requests

Remove the “MIE QA – “ and “State QC – “ prefixes for the Case Review Type options shown under the Type column header in the list and in the Case Review select menu on the Case Review List page.

Remove the page validations that occur when Case Reviews are selected out of order on the Case Review List page.

1.3 Overview of Recommendations

Update Category 10181 – “Position Role” – to match the above request. Update the Case Review List page validation logic to remove the unwanted validations.

1.4 Assumptions

Existing options for Case Review Type are prefixed by either “MIE QA – “ or “State QC – “. Case Review Type options are not presently displayed in any other areas of the application.

There are no Batch or Task-related impacts created by allowing the QA and QC records to be added in various orderings rather than in a specific sequence.

2 RECOMMENDATIONS

2.1 Case Review List

2.1.1 Overview

Update the options in the Case Review select menu and the values displayed in the Type column on the Case Review List page.

2.1.2 Case Review List Mockup

Case Review List

Reviewer Number: 40076550	Program: CalFresh		
Case Number: B0S9742	Case Name: Case Name	Sample Month: 07/2016	

Type	Date	Agree With Findings	Assigned To
Non-Cooperation	07/30/2019	No	Edit
QC Supervisor	07/30/2019	Yes	Edit

Case Review: [Add](#)

Figure 2.1.2a – Case Review List

Case Review List

Reviewer Number: 40078286	Program: CalWORKs		
Case Number: B00ZK13	Case Name: Case Name	Sample Month: 02/2017	

Type	Date	Agree With Findings	Assigned To
No Data Found			

Case Review: [Add](#)

This [Type 1](#) page took 2.82 seconds to load.

- District QCM - First Level
- District QCM - Second Level
- MIE Manager
- Program Assistant
- QA Supervisor
- Error Review Panel**
- Non-Cooperation
- QC Supervisor
- Quality Control Monitor

Figure 2.1.2b – Case Review List

2.1.3 Description of Changes

1. Update the selectable options in the Case Review menu as follows:
 - a. Relabel "MIE QA - District QCM - First Level" as "District QCM - First Level".
 - b. Relabel "MIE QA - District QCM - Second Level" as "District QCM - Second Level".
 - c. Relabel "MIE QA - MIE Manager" as "MIE Manager".
 - d. Relabel "MIE QA - Program Assistant" as "Program Assistant".
 - e. Relabel "MIE QA - QA Supervisor" as "QA Supervisor".
 - f. Relabel "State QC - Error Review Panel Manager" as "Error Review Panel".
 - g. Relabel "State QC - Non-Cooperation" as "Non-Cooperation".
 - h. Relabel "State QC - QC Supervisor" as "QC Supervisor".
 - i. Relabel "State QC - QCM ERP Response" as "Quality Control Monitor".
2. Update the values that display in the Type column in the same way that the selectable options in the Case Review menu are updated, above.
3. Disable the following validations that occur when attempting to add Case Reviews in specific orders:
 - a. "Please verify that MIE QA - QA Supervisor case review is submitted for the quality review record"
 - b. "Please verify that MIE QA - Program Assistant case review is submitted for the quality review record"
 - c. "Please verify that MIE QA - District QCM - Second Level case review is submitted for the quality review record"
 - d. "Please verify that MIE QA - District QCM - First Level case review is submitted for the quality review record"
 - e. "Please verify that State QC - QC Supervisor case review is submitted for quality review record"
 - f. "Please verify that State QC - Error Review Panel Manager case review is submitted for quality review record"
4. Update the text of the following validations that occur when attempting to add State-related Case Reviews when County-related ones already exist, and vice-versa.
 - a. Update "This is a County Case Review. Please select MIE QA case reviews to add" to read "This is a County Case Review. Please select QA case reviews to add."
 - b. Update "This is a State Case Review. Please select State QC case reviews to add" to read "This is a State Case Review. Please select QC case reviews to add."

2.1.4 Page Location

Global: Special Units

Local: Quality Review

Task: Case Review

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1414	<p>The CONTRACTOR shall update the Case Review List page as follows:</p> <ol style="list-style-type: none">1) Relabel MIE QA to District QCM - First Level2) Relabel MIE QA to District QCM - Second Level3) Relabel MIE QA to MIE Manager4) Relabel MIE QA to Program Assistant5) Relabel MIE QA to QA Supervisor6) Relabel State QC Error Review Panel Manager to Error Review Panel7) Relabel State QC Non-Cooperation to Non-Cooperation8) Relabel State QC Supervisor to QC Supervisor9) Relabel State QC QCM ERP Response to Quality Control Monitor <p>The CONTRACTOR shall remove the validations that occur when Case Reviews are selected out of order on the Case Review List page for the 57 Counties.</p>	<p>There are no other functional areas in the application that share these option values.</p>	<p>Case Review Type options are updated for the Case Review List page.</p>



California Statewide Automated Welfare System

Design Document

SCR 207327 DDID 1406 -

Update the QA/QC Batch page to only display
the batch names that apply to the County

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

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1 OVERVIEW

1.1 Current Design

The QA/QC Batch page is used to view all the currently available jobs that have been created for QA/QC. The page allows the user to add a new job or schedule, edit or delete an existing one.

1.2 Requests

Update the QA/QC Batch page to only display the batch names that apply to the County.

1.3 Overview of Recommendations

Modify the query used on the page to filter results based on County.

1.4 Assumptions

The County value used to filter the result is based on the County of the logged in user.

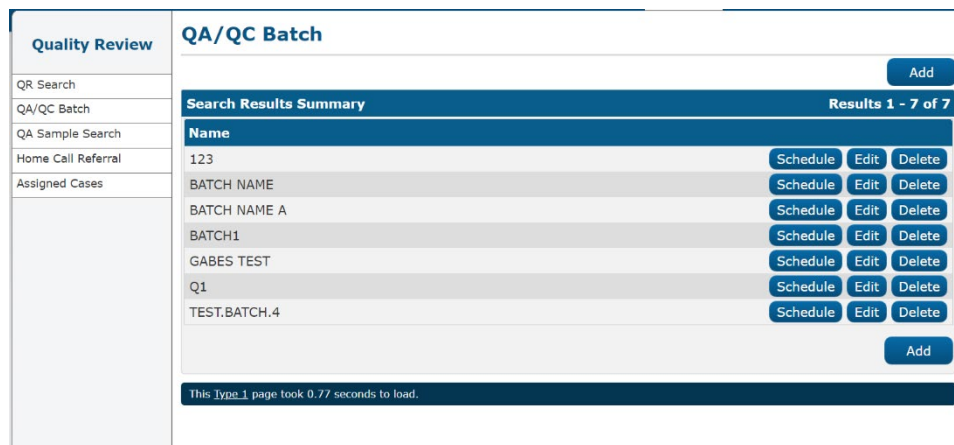
2 RECOMMENDATIONS

2.1 QA/QC Batch

2.1.1 Overview

There are no frontend changes required for this page. Page mockup is for reference only. Additional filtering will be added to the result query in order to filter the result displayed on the page.

2.1.2 QA/QC Batch Mockup



The mockup shows a sidebar on the left with a 'Quality Review' section containing links for 'QR Search', 'QA/QC Batch', 'QA Sample Search', 'Home Call Referral', and 'Assigned Cases'. The main content area is titled 'QA/QC Batch' and features an 'Add' button. Below this is a 'Search Results Summary' section showing 'Results 1 - 7 of 7'. A table lists seven items, each with 'Schedule', 'Edit', and 'Delete' buttons. The items are: 123, BATCH NAME, BATCH NAME A, BATCH1, GABES TEST, Q1, and TEST.BATCH.4. An 'Add' button is at the bottom right of the table. A status bar at the bottom indicates 'This type 1 page took 0.77 seconds to load.'

QA/QC Batch		
Search Results Summary Results 1 - 7 of 7		
Name	Schedule	Edit
123	Schedule	Edit
BATCH NAME	Schedule	Edit
BATCH NAME A	Schedule	Edit
BATCH1	Schedule	Edit
GABES TEST	Schedule	Edit
Q1	Schedule	Edit
TEST.BATCH.4	Schedule	Edit

Figure 2.1.1 – QA/QC Batch

2.1.3 Description of Changes

Add additional filtering to the page query based on logged in user County.

2.1.4 Page Location

Global: Special Units
Local: Quality Review
Task: QA/QC Batch

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1406	The Contractor shall update the QA/QC Batch page to only display the batch names that apply to the County.		



California Statewide Automated Welfare System

Design Document

CA-207330 DDID 1393 -
Migrate Value "In Review" to Workload Status

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

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4/3/19	0.1	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

This SCR aims to cover the design needed to add a new value of "In Review" to the Workload Status drop down on the IEVS Assignment page

1.1 Current Design

The IEVS Assignment page currently lacks the option "In Review" in the Workload Status drop down. As a result, cases cannot be filtered on by this status.

1.2 Requests

Add the status "In Review" to the Workload Status drop down.

1.3 Overview of Recommendations

Add the value "In Review" to the Workload Status drop down on the IEVS Assignment page.

Create/Modify a query to return records with the desired value.

1.4 Assumptions

The option "In Review" can be added to a record as described in DDID 1346.

2 RECOMMENDATIONS

2.1 IEVS Assignment

2.1.1 Overview

The search section has a Workload Status drop down that is used to filter the cases returned in the search. This is then used to assign a worker. The request is to add the value "In Review" to the Workload Status drop down.

2.1.2 IEVS Assignment Mockup

The mockup displays the 'IEVS Assignment' page. On the left is a sidebar with a menu: 'IEVS Abstracts' (expanded), 'IEVS Abstracts Search', 'IEVS Dispositions Search', 'IEVS Assignment' (selected), 'IEVS Review Case', and 'Disposition Search'. The main content area is titled 'IEVS Assignment' and includes a 'Search' button. A legend indicates that an asterisk (*) denotes required fields. The 'From' section contains filters for 'Search By:' (a dropdown set to 'Case'), 'Case Number:' (a text input with a 'Select' button), 'IEVS Abstract Type:' (a dropdown set to 'All'), 'Abstract Date Range' (with 'Begin Date' and 'End Date' inputs), and 'Assign Date Range' (with 'Begin Date' and 'End Date' inputs). The 'Workload Status:' dropdown is open, showing options: 'Assigned', 'Backlog', 'Completed', 'In Review' (highlighted), and 'Unassigned'. The 'To' section includes fields for 'Reviewer Name:', 'Reviewer ID:', and 'Reviewer Type:', each with a 'Select' button. At the bottom right, there is a 'Results per Page:' dropdown set to '25' and a 'Search' button. A status bar at the bottom left states 'This Type 1 page took 0.72 seconds to load.'

Figure 2.1.1 – Mockup Name

2.1.3 Description of Changes

Code table change to add "In Review" to the drop down. Update the query as needed to filter search results.

2.1.4 Page Location

Global: Special Units

Local: IEVS Abstract

Task: IEVS Assignment

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1393	The Contractor shall migrate the value of "In Review" to the "Workload Status" field on the IEVS Assignment page.	N/A	Value is added to the drop down.



California Statewide Automated Welfare System

Design Document

CA-207333 DDID 1387 –

Make Voucher a Non-Mandatory Field on
Service Arrangement Detail Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/28/2019	1.0	Initial Revision	Duke Vang

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1 OVERVIEW

1.1 Current Design

The Service Arrangement Detail page allow Workers to arrange supportive services to Customers with a Need. The current supportive services that can be requested are Valuables and Payment Requests.

1.2 Requests

Per Design Differences Identification (DDID) 1387, the “Voucher” field needs to be added to the Service Arrangement Detail page as a non-mandatory dropdown field.

1.3 Overview of Recommendations

The “Voucher” dropdown field will be added to the Service Arrangement Detail page. The field will only be visible as a non-mandatory field if “CFET” or “Welfare to Work” are selected on the “Program Type” dropdown field.

1.4 Assumptions

1. No additional changes are required on the Valuable Request Detail page. The Valuable Request Detail page will automatically detect that a voucher was requested from the Service Arrangement and will default the “Valuable Type” to a Voucher.
2. The CalFresh Employment & Training (CFET) program will be migrated into the CalSAWS System.

2 RECOMMENDATIONS

2.1 Service Arrangement Detail

2.1.1 Overview

The Service Arrangement Detail page allow Workers to arrange supportive services to Customers with a Need. Per DDID 1387, the "Voucher" dropdown field will be added to the Service Arrangement Detail page as a non-mandatory dropdown field when "CFET" or "Welfare to Work" are selected as the "Program Type".

2.1.2 Service Arrangement Detail Mockup

Service Arrangement Detail

*- Indicates required fields

Save and Return Cancel

Need *

Type	Name	Category	Begin Date
<input type="radio"/> Campus Parking		Transportation	01/12/2017
<input checked="" type="radio"/> Other		Ancillary - Work Related	05/05/2018

Activities

Type	Status	Begin Date	End Date
------	--------	------------	----------

Select

Arrangement Details

Arrangement Period: *

From: To:

Program Type: * **Aid Code: ***

Welfare to Work 32 - CW-TANF-Timed Out (State)

Voucher:

No

Payee: *

- Select -

Figure 2.1.1 – Service Arrangement Detail Create and Edit Mode

Service Arrangement Detail

* - Indicates required fields

Images

Save and Return

Cancel

Name: *

Service Arrangement ID:
807848997

Need *

Need Type:
[Education Related](#)

Need Category:
Ancillary - Education

Need Status:
Met

Need Description:

Activities

Type	Status	Begin Date	End Date
Job Skills Training - Empl	Completed	03/31/2018	06/16/2018

Arrangement Details

Arrangement Period: *

From: 05/31/2018 To: 06/18/2018

Program Type: *
Welfare to Work

Aid Code: *
32 - CW-TANF-Timed Out (State)

Voucher:
No

Payee: *

Figure 2.1.2 – Service Arrangement Detail View Mode

2.1.3 Description of Changes

1. Add a new non-mandatory dropdown field called "Voucher" to the Service Arrangement Detail page. The "Voucher" field will only be visible when the "Program Type" dropdown value is "CFET" or "Welfare to Work". The possible values for the "Voucher" dropdown field will be "No" and "Yes" and will default to "No".
2. Update the logic on the Service Arrangement Detail page to save the "Voucher" data point to the appropriate database backend column.

2.1.4 Page Location

Global: Employment Services

Local: Supportive Services

Task: Service Arrangement

2.1.5 Page Mapping

1. Update the page mapping on Service Arrangement Detail to account for the new "Voucher" field

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1387	The CONTRACTOR shall migrate the "Voucher" field as a non-mandatory field on the Service Arrangement Detail page and default the value to "No".	N/A	Added the "Valuable" dropdown field to the Service Arrangement Detail page. The field will be non-mandatory, will default to "No", and will only be visible if "CFET" or "Welfare to Work" is selected as the "Program Type".



California Statewide Automated Welfare System

Design Document

CA-207340 DDID 1367 –

Update Program Dropdown Field on Cash Aid
Time Limit Month Detail Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Duke Vang
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/28/2019	1.0	Initial Revision	Duke Vang

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1 OVERVIEW

1.1 Current Design

The Cash Aid Time Limit Month Detail page allows workers to manually add or edit an existing Time Limit Month for an individual. When adding or modifying a Time Limit Month, the "Program" dropdown field becomes a required field when selecting "Manual" or "Courtesy" as the "Add Reason". The possible values under "Program" are:

1. CalWORKs
2. Diversion
3. Homeless – Perm
4. Homeless – Temp
5. RCA
6. REP
7. Welfare to Work

1.2 Requests

Per Design Differences Identification (DDID) 1367, the "Welfare to Work" value under the "Program" dropdown field on the Cash Aid Time Limit Month Detail page needs to be relabeled to "Retention Services".

1.3 Overview of Recommendations

A new Codes Table Category will be created to capture the list of selectable Programs on the Cash Aid Time Limit Month Detail page. Of the list of programs, "Welfare to Work" will be relabeled as "Retention Services".

1.4 Assumptions

1. There will be no updates to the WDTIP batches. The batch job will continue to treat "Retention Services" in the same way as it currently treats "Welfare to Work".
2. There will be no logical updates required to the Cash Aid Time Limit Month Detail Pages to determine what clocks will count when the program is "Retention Services".

2 RECOMMENDATIONS

2.1 Cash Aid Time Limit Month Detail

2.1.1 Overview

The Cash Aid Time Limit Month Detail page allows workers to manually add or edit an existing Time Limit Month for an individual. Per DDID 1367, the “Welfare to Work” value under the “Program” dropdown field needs to be relabeled to “Retention Services”. A new Codes Table Category will be created to capture the list of selectable Programs on the Cash Aid Time Limit Month Detail page and “Welfare to Work” will be relabeled as “Retention Services”.

2.1.2 Cash Aid Time Limit Month Detail Mockup

Cash Aid Time Limit Month Detail

*- Indicates required fields

Name: * [Redacted]
Effective Month: * 06/2015
Add Reason: * Manual
Aid Issued By: * Los Angeles
Send to WDTIP? * Yes
Case Number: * [Redacted]
Program: * CalWORKs, Diversion, Homeless - Perm, Homeless - Temp, RCA, REP, Retention Services
Aid Code: * 3W - CW-TANF-Timed Out (State)

Type	Reason	Clocks	Created By
[Dropdown]	[Dropdown]		

Last Updated On 03/29/2018 4:57:13 PM By: [251074](#)

Figure 2.1.1 – Cash Aid Time Limit Month Detail

2.1.3 Description of Changes

1. Create a new Category called “Cash Aid Time Limit Programs”. The new Category ID will be 10539 and will have no Field Label Descriptions.
2. Create the following Codes Table values for the new Category:

Code	Short/Long Description	Begin Date	End Date
CW	CalWORKs	1/1/1000	12/31/9999
DV	Diversion	1/1/1000	12/31/9999
HP	Homeless – Perm	1/1/1000	12/31/9999
HT	Homeless – Temp	1/1/1000	12/31/9999
RC	RCA	1/1/1000	12/31/9999
RE	REP	1/1/1000	12/31/9999
WT	Retention Services	1/1/1000	12/31/9999

- Update the Cash Aid Time Limit Month Detail page to populate the “Program” dropdown field with the Codes Tables values from the new “Cash Aid Time Limit Month Programs” Category (Category ID 10539). Only Codes Table values effective during the “Effective Month” will be displayed.
- Update the backend database column comment that stores the selected “Program” from the Cash Aid Time Limit Month Detail page to reflect the new Category Id 10539

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Time Limits

2.1.5 Page Mapping

- Update the Cash Aid Time Limit Month Detail page mappings for “Program” to reflect the new Category ID 10539.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1367	The CONTRACTOR shall update "WTW" to "Retention Services" on the Program dropdown field on the Cash Aid Time Limit Month Detail page.	<ol style="list-style-type: none">1. There will be no updates to the WDTIP batches. The batch job will continue to treat "Retention Services" in the same way as it currently treats "Welfare to Work".2. There will be no logical updates required to the Cash Aid Time Limit Month Detail Pages to determine what clocks will count when the program is "Retention Services".	Created a new Codes Table Category to list the possible cash programs for the Cash Aid Time Limit Month Detail page. Relabeled "Welfare to Work" to "Retention Services".



California Statewide Automated Welfare System

Design Document

CA-207345 DDID 1347 -

Relabel and update the "Disposition Date" to
"Review Date" on the IEVS Review Disposition
page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/25/2019	0.1	Initial Draft	Avi Bandaranayake

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1 OVERVIEW

1.1 Current Design

In the current LRS system starting at the IEVS Disposition Search page the user can search for a disposition associated to a Case or Reviewer. When the user adds a disposition to the case they are navigated to the IEVS Review Disposition page and can see the disposition date is blank. This value is updated with the system date when the disposition is saved.

1.2 Requests

The Contractor shall

- 1) Relabel the "Disposition Date" to "Review Date" on the IEVS Review Disposition page and populate the appropriate review date.
- 2) Relabel the "Disposition Date" to "Review Date" on the IEVS Disposition Search page.

1.3 Overview of Recommendations

Change the displayed label "Disposition Date" to read "Review Date" on the IEVS Review Disposition page.

Relabel the "Disposition Date" to "Review Date" on the IEVS Disposition Search page.

1.4 Assumptions

- 1) The date used for the review date will be the system date from when the disposition was added. No change from current behavior.
- 2) There is no change to the date on the IEVS Disposition Search page

2 RECOMMENDATIONS

2.1 IEVS Review Disposition page

2.1.1 Overview

Change the label of “Disposition Date” to “Review Date”.

2.1.2 IEVS Review Disposition Mockup

IEVS Abstracts

- IEVS Abstracts Search
- IEVS Dispositions Search**
- IEVS Assignment
- IEVS Review Case
- Disposition Search

IEVS Review Dispositions

* Indicates required fields

Save Cancel

Case Number: * Select Case Name:

Abstract Type: * - Select - Program: * - Select -

Review Date Range *

Begin Date: End Date:

Disposition Status: * - Select - Review Date:

Disposition Closure Code: Closure Date:

Discrepancy: Impact to AU:

OP/OI Established:

Figure 2.1.1 – IEVS Review Disposition page Mockup

2.1.3 Description of Changes

Change the label of “Disposition Date” to “Review Date”.

2.1.4 Page Location

Global: Special Units

Local: IEVS Abstract

Task: IEVS Disposition Search

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1347	The Contractor shall relabel "Disposition Date" to "Review Date" on the IEVS Review Disposition page and populate the "Review Date" field with the Review Date database field from C-IV functionality.	N/A	Field label will be changed to desired label.



California Statewide Automated Welfare System

Design Document

CA-207346 DDID 1346 -

Updates to IEVS Review Disposition page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Avi Bandaranayake
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/28/2019	0.1	Initial Draft	Avi Bandaranayake
7/25/2019	0.2	Updated 1.4 per Deliverable comments	Avi Bandaranayake
7/31/2019	0.3	Revising requirement	Avi Bandaranayake

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1 OVERVIEW

This SCR is to migrate an additional value "In Review" for the Disposition Status on the IEVS Review Case Disposition Detail page. This SCR also covers making the following fields non-mandatory. The fields are: Disposition Closure Code, Impact to AU and Discrepancy.

1.1 Current Design

The IEVS Review Case Disposition Detail page is only available in LRS. In the current LRS release 19.03 the option "In Review" is not available for the Disposition Status. The fields Disposition Closure Code, Impact to AU and Discrepancy become mandatory with adding a disposition and changing the disposition status.

1.2 Requests

Update the IEVS Review Disposition page as follows:

- 1) Migrate the dropdown value of "In Review" to the "Disposition Status" field.
- 2) Update the "Disposition Closure Code" field to be non-mandatory.
- 3) Update the "Impact to AU" field to be non-mandatory.
- 4) Update the "Discrepancy" field to be non-mandatory.
- 5) Relabel "Disposition Date" to "Review Date" in the Associated Disposition section.

1.3 Overview of Recommendations

Add "In Review" to the drop-down options for Disposition Status on the IEVS Review Case Disposition Detail page.

Remove mandatory field markers and validation for Disposition Closure Code, Impact to AU and Discrepancy.

Relabel Disposition Date to Review Date in the Associated Disposition section.

1.4 Assumptions

There are no downstream impacts of adding the value "In Review" to the drop down. This requirement is related to DDID 582 and DDID 1393.

2 RECOMMENDATIONS

2.1 IEVS Review Case Disposition Detail

2.1.1 Overview

Adding a new value "In Review" to the drop down. Remove mandatory field markers and validation for Disposition Closure Code, Impact to AU and Discrepancy.

2.1.2 IEVS Review Case Disposition Detail Mockup

IEVS Abstracts

- IEVS Abstracts Search
- IEVS Dispositions Search
- IEVS Assignment
- IEVS Review Case Disposition Search**

IEVS Review Case Disposition Detail

*- Indicates required fields

Case Number: * 2038640 **Case Name:** Case Name

Abstract Type: * PVS **Review Run Date: *** 06/28/2012

Associated Disposition

Name	Gender	DOB	Review Date	Disposition Status	Closure Date
<input checked="" type="checkbox"/> Parker Shadowmoth	Female	03/01/1983	08/09/2012	No Impact	08/09/2012

Disposition

Disposition Status: * - Select - **Program: *** - Select -

Disposition Closure Code: - Select -

Discrepancy: - Select - **Impact to AU:** - Select -

OP/OI Established: - Select -

Save **Cancel**

Figure 2.1.1 – IEVS Review Case Disposition Detail

2.1.3 Description of Changes

Add "In Review" to the drop-down options for Disposition Status on the IEVS Review Case Disposition Detail page. Consider using the CATGRY_ID 1814.

Store the value in the database in the same table and column at the values currently in the drop down.

Remove mandatory field markers for Disposition Closure Code, Impact to AU and Discrepancy.

Remove validation on save for Disposition Closure Code, Impact to AU and Discrepancy.

Relabel Disposition Date to Review Date in the Associated Disposition section.

2.1.4 Page Location

Global: Special Units

Local: IEVS Abstract

Task: IEVS Review Case Disposition Search

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1346	<p>Original:</p> <p>The CONTRACTOR shall update the IEVS Review Disposition page as follows:</p> <ol style="list-style-type: none">1) Migrate the dropdown value of "In Review" to the "Disposition Status" field2) Update the "Disposition Closure Code" field to be non-mandatory3) Update the "Impact to AU" field to be non-mandatory4) Update the "Discrepancy" field to be non-mandatory <p>Revised:</p> <p>The CONTRACTOR shall update the IEVS Review Disposition page as follows:</p> <ol style="list-style-type: none">1) Migrate the dropdown value of "In Review" to the "Disposition Status" field2) Update the "Disposition Closure Code" field to be non-mandatory3) Update the "Impact to AU" field to be non-mandatory4) Update the "Discrepancy" field to be non-mandatory5) Relabel "Disposition Date" to "Review Date" in the Associated Disposition section.	<p>There are no other functional areas in the system that require these fields to be mandatory.</p>	<p>"In Review" will be added to the drop down. Fields will be updated to be non mandatory</p>



California Statewide Automated Welfare System

Design Document

CA-207365 DDID 1234– Add Non-Compliance of
Failure to Provide-Vendor Information

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Yale Yee
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/27/2019	1.0	Initial Document	Yale Yee
06/10/2019	1.1	Correspondence Requirements Added	Brian Furlong
7/25/2019	1.2	Added a note to 2.1 for the default value and alphabetizing multi-select input field	Yale Yee
07/25/2019	1.3	Updated 2.3 header per DEL review comments	Brian Furlong

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1 OVERVIEW

1.1 Current Design

In LRS, the Non-Compliance Type of 'Failure to Provide' and the Non-Compliance Reason of 'Vendor Information' is not available to be selected as a Non-Compliance for a CalWORKs Program.

1.2 Requests

The Non-Compliance Type of 'Failure to Provide' and the Non-Compliance Reason of 'Vendor Information' will be available to be selected as a Non-Compliance for a CalWORKs Program. In addition, Vendor Types will be added when the Vendor Information Reason is selected.

The Failure to Provide Vendor Information Reason fragment will generate on the NOA whenever the EDBC results in a program denial or discontinuance with a Status Reason of FTP Vendor Information.

1.3 Overview of Recommendations

The Non-Compliance Type of 'Failure to Provide' and the Non-Compliance Reason of 'Vendor Information' will be added to the Eligibility Non-Compliance Detail page.

Generate the Failure to Provide Vendor Information Reason fragment when EDBC results in a program denial or discontinuance with a Status Reason of FTP Vendor Information.

When the Non-Compliance record includes vendor type(s) (CT1811), the vendor type(s) will be listed in the fragment. If no vendor type(s) is selected, a generic fragment will be used.

1.4 Assumptions

None

2 RECOMMENDATIONS

2.1 Eligibility Non-Compliance Detail page

2.1.1 Overview

The Eligibility Non-Compliance Detail page provides detailed information about Non-Compliances. This page will be updated to add a Non-Compliance Type and a Non-Compliance Reason.

2.1.2 Eligibility Non-Compliance Detail Mockup

Eligibility Non-Compliance Detail

*- Indicates required fields

Save and Add Another

The mockup displays a form for recording a non-compliance. It includes a 'Program' dropdown set to 'Cash', a 'Name' dropdown set to 'Child Test', a 'Type' dropdown set to 'Failure to Provide', and a 'Reason' dropdown set to 'Vendor Information'. The 'Vendor Type' is shown as a list with 'Electric', 'Gas', and 'Housing Statement'. 'Begin Date' and 'End Date' are date pickers. Below the main form, three additional 'Vendor Type' lists are shown, each with its own set of options: the first has 'Electric', 'Gas', and 'Housing Statement'; the second has 'Insurance', 'Mortgage', 'Property Tax', and 'Rent'; the third has 'Property Tax', 'Rent', 'Space Rent', and 'Water'.

Program:	Name: *	Type: *	Reason: *	Vendor Type:	Begin Date: *	End Date:
Cash	Child Test	Failure to Provide	Vendor Information	Electric Gas Housing Statement		

Vendor Type:	Vendor Type:	Vendor Type:
Electric Gas Housing Statement	Insurance Mortgage Property Tax Rent	Property Tax Rent Space Rent Water

Figure 2.1.1 – Failure to Provide – Vendor Information

2.1.3 Description of Changes

1. Add a Non-Compliance Type of 'Failure to Provide' and the Non-Compliance Reason of 'Vendor Information' for a CalWORKs Program. The begin date will be 01/01/1000.
2. Add the following as multi-select input for the field Vendor Type:
 - a. Electric
 - b. Gas
 - c. Housing Statement
 - d. Insurance
 - e. Mortgage
 - f. Property Tax
 - g. Rent
 - h. Space Rent
 - i. Water

The begin date will be 01/01/1000.

Note: The default value will be 'Blank' and the Vendor Type will be in alphabetical order. And, the Vendor Type multi-select input will appear dynamically when Vendor Information is selected.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Non-Compliance

2.2 Add a New Status Reason for Failure to Provide Vendor Information

2.2.1 Overview

When a Non-Compliance of Failure to Provide Vendor Information is determined during an EDBC run, the EDBC will deny or discontinue for failing to provide vendor information.

2.2.2 Description of Changes

Add a status reason, "FTP Vendor Information", to EDBC to deny or discontinue for failing to provide vendor information. The begin date of the status reason will be 01/01/2014.

2.2.3 Programs Impacted

CalWORKs

2.2.4 Performance Impacts

N/A

2.3 Add new FTP Vendor Information NOA Reason with At Least One Vendor Type

2.3.1 Overview

A new Reason for the new 'FTP Vendor Information' Status Reason (See Recommendation 2.2) will be added to CalWORKs NOAs when there exists at least one Vendor Type on the Non-Compliance Detail page (See Recommendation 2.1). This new Reason Fragment will be added in English only.

2.3.2 Create a new Reason Fragment

Create a new Reason Fragment for CalWORKs NOAs:

Language	Text	Formatting
English	You did not provide the <VendorTypeList> information requested to set up Vendor Payments.	Arial size 10 font

This new Reason will generate with the following existing Header/Footer fragments based upon the NOA action.

NOA Action	Header/Action Fragment	Footer/Message Fragment
CW Denial	CW_DN_ACTION1 (ID: 4015)	CW_DN_MESSAGE4 (ID: 5017)
CW Discontinuance	CW_TN_ACTION4 (ID: 4026)	CW_TN_MESSAGE1 (ID: 5022)

2.3.3 Add Generation for a new Reason Fragment

Generate the Failure to Provide Vendor Information Reason fragment when the following is true for the current EDBC:

- The CalWORKs program is Denied or Discontinued
- The program failed for the Status Reason of 'FTP Vendor Information'
- There exists at least one Vendor Type on the Non-Compliance Detail page

2.3.4 Add Variable Population logic for new Reason Fragment

Add variable population for the new Reason Fragment:

Variable	Population	Formatting*
<VendorTypeList>	CT1811 – List of vendor types which verifications have not been provided, separated by a comma when more than one. For example: "Electric, Gas, Housing".	Arial size 10 font

2.3.5 Add Regulations for new Reason Fragment

Add the following Regulations when generating the new Reason Fragment:

Title 22, CCR, Section 50179.5; MPPs 44-307, 40-105, 40-157.3, 22-001(a)(1), 22-001(t)(1), 40-126

2.3.6 Add NOA Description and Footer Reference for new Reason Fragment

Add the following NOA Description (shown on Document List page) and Footer Reference for the new Reason Fragment:

NOA Description: FTP: Vendor Information with Type

NOA Template/Footer: NOA 290

2.3.7 NOA Mock Ups

2.3.7.1 CW Denial NOA - Vendor Type List

Rancho Park 100 W PICO DE GAYO BLVD LOS ANGELES, CA 90064	COUNTY OF {CountyName}	STATE OF CALIFORNIA HEALTH AND WELFARE AGENCY DEPARTMENT OF SOCIAL SERVICES
--	-------------------------------	--

NOTICE DATE:	June 10, 2019
CASE NAME:	Regular People
CASE NUMBER:	L001EE7
WORKER NAME:	ScUsr DepDistDrctor
WORKER ID:	19DP9JAA04
TELEPHONE NUMBER:	(562) 651-2000
CUSTOMER ID:	5556679490

NOTICE OF ACTION
CALWORKS DENIAL

Regular People
15 54TH PL
LONG BEACH, CA 90803-3482

TEST USE ONLY

Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

The County has denied your application for cash aid dated {EffectiveDenialDate}.

Here's why:


You did not provide the {VendorTypeList} information requested to set up Vendor Payments.

Even though you cannot get cash aid, you may still be able to get child support from your child's other parent. For help getting child support, call Child Support Services Department at 1-866-901-3212.

DO NOT DISTRIBUTE

Rules: These rules apply; you may review them at your local welfare office: Title 22, CCR, Section 50179.5; MPPs 44-307, 40-105, 40-157.3, 22-001(a)(1), 22-001(t)(1), 40-126

NOA 290 Page 1 of 1


809392832

2.3.7.2 CW Discontinuance NOA - Vendor Type List

Rancho Park
100 W PICO DE GAYO BLVD
LOS ANGELES, CA 90064

COUNTY OF {CountyName}

STATE OF CALIFORNIA
HEALTH AND WELFARE AGENCY
DEPARTMENT OF SOCIAL SERVICES

NOTICE DATE: June 10, 2019
CASE NAME: Regular People
CASE NUMBER: L001EE7
WORKER NAME: ScUsr DepDistDrtor
WORKER ID: 19DP9JAA04
TELEPHONE NUMBER: (562) 651-2000
CUSTOMER ID: 5556679490

NOTICE OF ACTION CALWORKS TERMINATION

Regular People
15 54TH PL
LONG BEACH, CA 90803-3482

As of {EffectiveDiscontinuanceDate}, the County is stopping your cash aid.

Here's why:

You did not provide the {VendorTypeList} information requested to set up Vendor Payments.

EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw it away.

Medi-Cal: This notice DOES NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal benefits, you will receive another notice. Keep using your plastic Benefits Identification Card(s).

CalFresh: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.

Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits.

Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

Rules: These rules apply; you may review them at your local welfare office: Title 22, CCR, Section 50179.5; MPPs 44-307, 40-105, 40-157.3, 22-001(a)(1), 22-001(t)(1), 40-126



2.4 Add new FTP Vendor Information NOA Reason with no Vendor Type

2.4.1 Overview

A new Reason for the new 'FTP Vendor Information' Status Reason (See Recommendation 2.2) will be added to CalWORKs NOAs when does not exist a Vendor Type on the Non-Compliance Detail page (See Recommendation 2.1). This new Reason Fragment will be added in English only.

2.4.2 Create a new Reason Fragment

Create a new Reason Fragment for CalWORKs NOAs:

Language	Text	Formatting
English	You did not provide the housing or utility information requested to set up Vendor Payments.	Arial size 10 font

This new Reason will generate with the following existing Header/Footer fragments based upon the NOA action.

NOA Action	Header/Action Fragment	Footer/Message Fragment
CW Denial	CW_DN_ACTION1 (ID: 4015)	CW_DN_MESSAGE4 (ID: 5017)
CW Discontinuance	CW_TN_ACTION4 (ID: 4026)	CW_TN_MESSAGE1 (ID: 5022)

2.4.3 Add Generation for a new Reason Fragment

Generate the Failure to Provide Vendor Information Reason fragment when the following is true for the current EDBC:

- The CalWORKs program is Denial or Discontinued
- The program failed for the Status Reason of 'FTP Vendor Information'
- There does not exist a Vendor Type on the Non-Compliance Detail page.

2.4.4 Add Regulations for new Reason Fragment

Add the following Regulations when generating the new Reason Fragment:

Title 22, CCR, Section 50179.5; MPPs 44-307, 40-105, 40-157.3, 22-001(a)(1), 22-001(f)(1), 40-126

2.4.5 Add NOA Description and Footer Reference for new Reason Fragment

Add the following NOA Description (shown on Document List page) and Footer Reference for the new Reason Fragment:

NOA Description: FTP: Vendor Information

NOA Template/Footer: NOA 290

2.4.6 NOA Mockups

2.4.6.1 CW Denial NOA – No Vendor Type List

Rancho Park 100 W PICO DE GAYO BLVD LOS ANGELES, CA 90064	COUNTY OF {CountyName}	STATE OF CALIFORNIA HEALTH AND WELFARE AGENCY DEPARTMENT OF SOCIAL SERVICES
--	-------------------------------	--

NOTICE DATE:	June 10, 2019
CASE NAME:	Regular People
CASE NUMBER:	L001EE7
WORKER NAME:	SoJsr DepDistDrtor
WORKER ID:	19DP9JAA04
TELEPHONE NUMBER:	(562) 651-2000
CUSTOMER ID:	5556679490

NOTICE OF ACTION CALWORKS DENIAL	Regular People 15 54TH PL LONG BEACH, CA 90803-3482
---	---

The County has denied your application for cash aid dated {EffectiveDenialDate}.

Here's why:

You did not provide the housing or utility information requested to set up Vendor Payments.

Even though you cannot get cash aid, you may still be able to get child support from your child's other parent. For help getting child support, call Child Support Services Department at 1-866-901-3212.


Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

**DO NOT
DISTRIBUTE**

Rules: These rules apply; you may review them at your local welfare office: Title 22, CCR, Section 50179.5; MPPs 44-307, 40-105, 40-157.3, 22-001(a)(1), 22-001(t)(1), 40-126

NOA 290	Page 1 of 1
---------	-------------


809392832

2.4.6.2 CW Discontinuance NOA – No Vendor Type List

Rancho Park
100 W PICO DE GAYO BLVD
LOS ANGELES, CA 90064

COUNTY OF {CountyName}

STATE OF CALIFORNIA
HEALTH AND WELFARE AGENCY
DEPARTMENT OF SOCIAL SERVICES

NOTICE DATE: June 10, 2019
CASE NAME: Regular People
CASE NUMBER: L001EE7
WORKER NAME: ScUsr DepDistDrtor
WORKER ID: 19DP9JAA04
TELEPHONE NUMBER: (562) 651-2000
CUSTOMER ID: 5556679490

NOTICE OF ACTION CALWORKS TERMINATION

Regular People
15 54TH PL
LONG BEACH, CA 90803-3482

As of {EffectiveDiscontinuanceDate}, the County is stopping your cash aid.

Here's why:

You did not provide the housing or utility information requested to set up Vendor Payments.

EBT: Keep your plastic Golden State Advantage card if you use Electronic Benefit Transfer (EBT), even if your aid is terminated. Please do not throw it away.

Medi-Cal: This notice DOES NOT change or stop Medi-Cal benefits. If there is a change in your Medi-Cal benefits, you will receive another notice. Keep using your plastic Benefits Identification Card(s).

CalFresh: This notice DOES NOT stop or change your CalFresh benefits. You will get a separate notice telling you about any changes to your CalFresh benefits.

Receiving Medi-Cal and/or CalFresh only DOES NOT count against your cash aid time limits.

Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

Rules: These rules apply; you may review them at your local welfare office: Title 22, CCR, Section 50179.5; MPPs 44-307, 40-105, 40-157.3, 22-001(a)(1), 22-001(t)(1), 40-126



3 REQUIREMENTS

3.1 Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1234	The CONTRACTOR shall migrate the "Failure to Provide-Vendor Information," Non-Compliance Type/Non-Compliance Reason to the CalSAWS Software.	None	The Non-Compliance Type of 'Failure to Provide' and the Non-Compliance Reason of 'Vendor Information' is added to the Eligibility Non-Compliance Detail page.



California Statewide Automated Welfare System

Design Document

CA-207369 DDID 1191

Add the "Did the sponsor sign an I-864?"
dropdown field with the values of "Yes" and "No"
on the Sponsorship Detail page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Original	Melissa Mendoza
07/25/2019	1.1	Added Mockup Section title and completed assumption per Deliverable comments.	Melissa Mendoza

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1 OVERVIEW

1.1 Current Design

The Sponsorship Detail page does not currently capture information about the I-864 form.

1.2 Requests

Per DDID 1191, add the following question to the Sponsorship Detail page: "Did the sponsor sign an I-864?"

1.3 Overview of Recommendations

Migrate the "Did the sponsor sign an I-864?" dropdown field with the values of "Yes" and "No" on the Sponsorship Detail page.

1.4 Assumptions

The addition of this field is for tracking purposes only and there is no automation around this field. It is not used in the Eligibility Determination and Benefit calculation and the value does not populate on any other pages in the system.

2 RECOMMENDATIONS

2.1 Sponsorship Detail

2.1.1 Overview

Add the following question, "Did the sponsor sign an I-864?" dropdown field with the values of "Yes" and "No" to the Sponsorship Detail page.


2.1.2 Sponsorship Detail Mockup

Sponsorship Detail

*- Indicates required fields

Save and Add Another Save and Return Cancel

Establish Change Reason

Change Reason: * Participant Provided - Written ▼ **Reported Date: *** 03/27/2019 

Sponsor: Individual

Sponsored Non-Citizen's Name: *

- Select -
Smith, Melissa 24F

Sponsor's Name: *

- Select - ▼

Sponsor's Household Size: * 0

Total Number of Sponsored Non-Citizens: * 0

Did the sponsor sign an I-864? *

- Select -
Yes
No

Does the sponsor help with money? *

- Select - ▼

Does the sponsor help with any of the following?

☐ Rent ☐ Clothes
☐ Food ☐ Other



Begin Date: *  **End Date:** 

Figure 2.1.2 Sponsorship Detail Mockup

2.1.3 Description of Changes

1. Add the following question, "Did the sponsor sign an I-864?" dropdown field with the values of "Yes" and "No" to the Sponsorship Detail page.
2. Add the question above the "Does the sponsor help with money?" question.
3. The question will be required and default to Select.
4. Update the Page Mapping to include the new question.

2.1.4 Page Location

Global Navigation: Eligibility

Local Navigation: Customer Information

Task Navigation: Sponsorship

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add "Did the sponsor sign an I-864?" to Page Mapping.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1191	The CONTRACTOR shall migrate "Did the sponsor sign an I-864?" dropdown field with the values of "Yes" and "No" on the Sponsorship Detail page.	N/A	Add Did the sponsor sign an I-864?" dropdown field with the values of "Yes" and "No" to the Sponsorship Detail page.



California Statewide Automated Welfare System

Design Document

CA-207370 DDID 1190

Add the Child Support Participant Information
Section to the Support Questionnaire Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Initial	Darren Goostree

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3	Requirements	7
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1 OVERVIEW

1.1 Current Design

The Support Questionnaire page captures and displays information about the parents and caregivers of children with absent parents.

1.2 Requests

Per DDID 1190, add the Child Support Participant Section to the Support Questionnaire page to display the customer's information received from California Child Support Automation System (CCSAS), also referred to as "IV-D".

1.3 Overview of Recommendation

Add the Child Support Participant Section to the Support Questionnaire page. The section displays the Name, IV-D Participant ID, Case Person ID, and Absent Parent ID for each case person who is in CCSAS.

1.4 Assumptions

The data points to populate the section is already received by the system.

2 RECOMMENDATIONS

2.1 Support Questionnaire

2.1.1 Overview

Add the Child Support Participant Information section to the Support Questionnaire page. This section displays the information received from the CCSAS interface.

2.1.2 Support Questionnaire Mockup

Note: Due to the size of the page, only the relevant portion is pictured below.

▶ L. Whereabouts

▼ Child Support Participant Information

Name	IV-D Participant ID	Case Person ID	Absent Parent ID
Morty Smith	300000005710193	823360342	
Barbara Taylor	300000005710192	804523794	808520026

SUPPORT ENFORCEMENT SERVICES (MEDI-CAL ONLY)

Do you want other child support enforcement services?

Certification and Agreement

Assign Child/Spousal Support Rights

Type	Begin Date	End Date
No Data Found		

Assign Medical Support Rights

Type	Begin Date	End Date
No Data Found		

Child Support Cooperation

Type	Begin Date	End Date
No Data Found		

Generate Form

Edit

Close

Last Updated On 02/20/2019 1:59:48 PM By: [249614](#)

This Type 1 page took 1.30 seconds to load.

Figure 2.1.1 – Support Questionnaire

2.1.3 Description of Changes

Add the Child Support Participant Information section to the page. This section displays above the SUPPORT ENFORCEMENT SERVICES (MEDI-CAL ONLY) section. When the section is empty, it appears collapsed, and expanding it will display "No Data Found". The fields in this section are:

- **Name:** The name of the child in CCSAS.
- **IVD Participant ID:** The ID of the child in CCSAS.
- **Case Person ID:** The Case Person ID of the child.
- **Absent Parent ID:** The Person ID of the child's absent parent, should they exist in the system.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Absent Parents

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Add page mapping for the new fields on this page.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1190	The CONTRACTOR shall migrate the Child Support Participant Information section on the Support Questionnaire page.	N/A	Child Support Participant Information added to the Support Questionnaire page as described.



California Statewide Automated Welfare System

Design Document

CA-207371 DDID 1182

Rename the Expiration Date Field on the
Degrees Licenses List Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Initial	Darren Goostree

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2.1.6	Page Mapping.....	6
2.1.7	Page Usage/Data Volume Impacts	6
3	Requirements	6
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1 OVERVIEW

1.1 Current Design

The Degrees Licenses List page displays a listing of Degrees Licenses records for the current case. Among the information displayed on the page is the Expiration Date field.

1.2 Requests

Per DDID 1182, relabel the “Expiration Date” column to “Termination Date” to support the 58-county solution. This change also aligns this page with the field on Degrees Licenses Detail page.

1.3 Overview of Recommendations

Relabel the “Expiration Date” field to “Termination Date” on the Degrees Licenses List page.

Update page mapping for the Degrees Licenses List page to reflect the relabeling of this field.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Degrees Licenses List

2.1.1 Overview

The Degrees Licenses List page displays a listing of Degrees Licenses records for the current case.

Relabel the “Expiration Date” field on this page to “Termination Date,” and update the page’s page mapping to reflect this change.

2.1.2 Degrees Licenses List Mockup

Degrees Licenses List

*- Indicates required fields

Continue

Root Questions

Search Results Summary

Results 1 - 1 of 1

Display by Name:

All

View

Add

Type*	Name*	Title*	Date Received*	Termination Date
<input type="checkbox"/> Highest Grade Completed	Henderson, Lois	Description	06/01/2018	<div>Edit</div> <div>View History</div>

Remove

Add

☐ Complete

Continue

This Type 1 page took 0.33 seconds to load.

Figure 2.1.1 – Degrees Licenses List

2.1.3 Description of Changes

Relabel the Expiration Date field to Termination Date.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Degrees Licenses

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

Update page mapping to reflect the relabeling of this field.

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1182	The CONTRACTOR shall relabel the "Expiration Date" column to "Termination Date" on the Degrees Licenses List page.	N/A	Field relabeled as described.



California Statewide Automated Welfare System

Design Document

DDID 1089 SCR 207377 – Rename the Date
Reported to GSW Field on the Cal-Learn
Progress Detail page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Initial	Darren Goostree
07/24/2019	1.1	Added Sections 2.2 and 2.3 per Deliverable Comments. Revised Migration Requirement.	Melissa Mendoza

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1 OVERVIEW

1.1 Current Design

The Cal-Learn Progress Detail page captures and displays the fields used to record the customer's Cal-Learn progress. Among the information on the page is the Date Reported to GSW field.

1.2 Requests

Per DDID 1089, rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker to support the 58-county solution.

1.3 Overview of Recommendations

Rename the Date Reported to GSW (Gain Social Worker) to Date Reported to Cal-Learn County Worker on the Cal-Learn Progress Detail, Cal-Learn Non-Compliance Cause Determination Detail and Learning Disability Evaluation Result Detail pages. Update the dropdown fields on the Cal-Learn Non-Compliance Cause Determination Detail page from GSW to Cal-Learn Worker.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 Cal-Learn Progress Detail

2.1.1 Overview

Update the Cal-Learn Progress Detail page to rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker.

2.1.2 Cal-Learn Progress Detail Mockup

Cal-Learn Progress Detail

*- Indicates required fields

Edit

Close

Name: * Lois Henderson	Cal-Learn 90 Day:	
Begin Date: * 03/03/2019	End Date:	
Report Due Date: * 03/10/2019	Date Reported to AFLP:	Date Reported to Cal-Learn County Worker:
GPA:		
Progress Status: Unsatisfactory	Need Cause Determination: * Yes	

Non-Compliance Cause Determination

<input type="checkbox"/>	Discovery Date	Reason	Resolution Date	Recommend Sanction
<input type="checkbox"/>	03/29/2019	The participant did not make adequate progress in school		
	03/04/2019	The participant did not go to school		

Remove

Add

Edit

Close

Figure 2.1.1 – Cal-Learn Progress Detail

2.1.3 Description of Changes

Rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker.

2.1.4 Page Location

Global: Empl. Services

Local: Case Summary

Task: Cal-Learn Progress

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Cal-Learn Non-Compliance Cause Determination Detail

2.2.1 Overview

Update the Cal-Learn Non-Compliance Cause Determination Detail page to use Cal-Learn Worker instead of GSW.

2.2.2 Cal-Learn Non-Compliance Cause Determination Detail Mockup

Cal-Learn Non-Compliance Cause Determination Detail

*- Indicates required fields

Save and Add Appointment

Cancel

Name:

Bell, Emma

Cal-Learn 90 Day:

Begin Date: *

07/24/2019

End Date:

Report Due Date: *

07/24/2019

Date Reported to AFLP:

Date Reported to Cal-Learn

County Worker:

07/17/2019

GPA:

Cal-Learn Non-Compliance Cause Determination Detail

Discovery Date: *

07/24/2019

Interview Type:

Good Cause:

Cancellation:

Recommend Sanction:

Comment:

Non-Compliance Reason: *

The participant did not make adequate progress in school

Interview Result:

Acts of Nature/Travel Prevented

Breakdown in Child Care

Breakdown in Transportation

Child Care not available

Exemption/Deferral criteria met

Family Death/Required in home

Incapacitated

Medical Service Refused

No Good Cause

No Show

Other reason approved by Cal-Learn Worker

Referred to Cal-Learn Worker - No Good Cause

Required in Court/Jail

Special Need Child Care unavailable

Figure 2.2.2 – Cal-Learn Non-Compliance Cause Determination Detail Mockup

2.2.3 Description of Changes

1. Rename the Date Reported to GSW field to Date Reported to Cal-Learn County Worker.
2. Under Interview Result rename the following in the dropdown:
 - a. Other reason approved by GSW to Other reason approved by Cal-Learn Worker
 - b. Referred to GSW – No Good Cause to Referred to Cal-Learn Worker – No Good Cause

2.2.4 Page Location

Global: Empl. Services

Local: Case Summary

Task: Cal-Learn Progress

Need Cause Determination > Yes

Non- Compliance Cause Determination > Add button

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Learning Disability Evaluation Result Detail page

2.3.1 Overview

Update the Learning Disability Evaluation Result Detail page to use Cal-Learn County Worker instead of GSW.

2.3.2 Cal-Learn Non-Compliance Cause Determination Detail Mockup

Activity or Goal 3
Activity or Goal:
Result: *
<input type="text"/>
Report sent to Cal-Learn County Worker
<input type="text" value="No"/>
Report sent within 18 days:

2.3.3 Description of Change

Update the section Activity or Goal 3 on the Learning Disability Evaluation Result Detail page by updating the label from Report sent to GSW to Report sent to Cal-Learn County Worker.

2.3.4 Page Location

Global: Empl. Services

Local: Case Summary

Task: Assessment Results

Category > Learning Disability

**Assessment Result Detail > Learning Disability Evaluation Result
button**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1089	<p>Original:</p> <p>The CONTRACTOR shall relabel "Date Reported to GSW (Gain Social Worker)" to "Date Reported to Cal-Learn County Worker" on the Cal-Learn Progress Detail page.</p> <p>Revised:</p> <p>The CONTRACTOR shall relabel "Date Reported to GSW (Gain Social Worker)" to "Date Reported to Cal-Learn County Worker" on the Cal-Learn Progress Detail, Cal-Learn Non-Compliance Cause Determination Detail and Learning Disability Evaluation Result Detail pages. The CONTRACTOR shall update the dropdown fields on the Cal-Learn Non-Compliance Cause Determination Detail page from GSW to Cal-Learn Worker.</p>	Cal-Learn Non Compliance and Learning Disability will also have their GSW fields changed to matched.	Rename GSW to Cal-Learn.



California Statewide Automated Welfare System

Design Document

DDID 1023 CA-207406

Staff Assignment List Unit ID Field Update When
No Office is Selected

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kristine Lim
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/28/2019	1.0	Original	Kristine Lim
07/26/2019	1.1	Updated Sections 2.1 (all subsections) per Deliverable comments	Kristine Lim

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1 OVERVIEW

1.1 Current Design

The Unit ID field of the Staff Assignment List page displays a dropdown input containing each Unit and Section ID associated to the office selected in the Office field. DDID 1022/CA-207407 updated the Office field such that it is no longer a required field.

1.2 Requests

Per DDID 1023, update the Unit ID field of the Staff Assignment List to contain a text input field instead of a dropdown when no value is selected in the Office field and update the Unit ID to display only those Units associated with the Office selected.

1.3 Overview of Recommendations

Update the Unit ID field of the Staff Assignment List page to display a text input when no value is selected in the Office field. Also update the Section ID field so it is no longer required and to make it an input field when no value is selected in the Office field.

1.4 Assumptions

- Requirement has been revised to also update the Section ID field, so it is no longer required and make it an input text field when no Office is selected since C-IV Counties does not require a Section ID to be selected.
- Requirements has been revised to remove "Update the "Unit ID" dropdown field to display only those units that are associated to the office selected" as this is current functionality and no system change is needed.
- This request releases simultaneously with DDID 1022/CA-207407.

2 RECOMMENDATIONS

2.1 Staff Assignment List

2.1.1 Overview

Update the Unit ID and the Section ID field of the Staff Assignment List page to display a text input when no value is selected in the Office field.

2.1.2 Staff Assignment List Mockup

Staff Assignment List

*- Indicates required fields

Search

Department: *
Eligibility Services ▼

Office:
Select

Section ID:

Unit ID: *

Results per Page: 25 ▼ Search

Figure 2.1.2 Staff Assignment List Mockup

2.1.3 Description of Change

Update the Staff Assignment List page as follows:

- Update the "Unit ID" dropdown field to be a text field when an Office is not selected.
- Update the "Section ID" to no longer be a required field.
- Update the "Section ID" dropdown to be a text field when an Office is not selected.

2.1.4 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff Assignment List

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1023	<p>Original:</p> <p>The CONTRACTOR shall update the Staff Assignment List page as follows:</p> <ul style="list-style-type: none">1) Update the "Unit ID" dropdown field to be a text field when an Office is not selected2) Update the "Unit ID" dropdown field to display only those units that are associated to the office selected <p>Revised:</p> <p>The CONTRACTOR shall update the Staff Assignment List page as follows:</p> <ul style="list-style-type: none">1) Update the "Unit ID" and "Section ID" dropdown fields to be a text field when an Office is not selected2) Update the "Section ID" to no longer be required	N/A	Page updated per revised requirement.



California Statewide Automated Welfare System

Design Document

DDID 1022 CA-207407

Update Staff Assignment List so the Office field is optional

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kristine Lim
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/20/2019	1.0	Original	Kristine Lim
07/26/2019	1.1	Updated Section 1.4 and 2.1 per Deliverable comments	Kristine Lim

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1 OVERVIEW

1.1 Current Design

The Staff Assignment List page is used to manage staff assignments to Offices, Sections, and Units. The Office field on the page is required.

1.2 Requests

Per DDID 1022, update the Staff Assignment List page so the Office ID is no longer required.

1.3 Overview of Recommendations

Update the Staff Assignment List page so the Office ID field is no longer required and add a Remove button to remove the selected Office.

1.4 Assumptions

There are no other functional areas in the system that require the "Office" button to be mandatory. There are other pages where the Office field is required and is auto populated with the Office of the User that is logged in. The User can remove that auto populated Office by selecting another Office in that field.

2 RECOMMENDATIONS

2.1 Staff Assignment List

2.1.1 Overview

The Staff Assignment List page is used to manage staff assignments to Offices, Sections, and Units. The Office field on the page is required. Per DDID 1022, update the Staff Assignment List page so the Office ID is no longer required.

2.1.2 Staff Assignment List Mockup

Staff Assignment List

*- Indicates required fields

The mockup shows a form with the following elements:

- Department:** A dropdown menu with "Family Services" selected. A red asterisk indicates it is a required field.
- Office:** A text field displaying "CITY OF NORWALK". To its right are "Select" and "Remove" buttons.
- Section ID:** A dropdown menu with "All" selected. A red asterisk indicates it is a required field.
- Unit ID:** A dropdown menu with "All" selected. A red asterisk indicates it is a required field.
- Search:** A blue button in the top right corner.
- Results per Page:** A dropdown menu showing "25" and a blue "Search" button.

Figure 2.1.2 Staff Assignment List Mockup

2.1.3 Description of Changes

Update the Staff Assignment List page as follows:

- 1) Update the Staff Assignment List page so the Office field is no longer required.
- 2) Add a Remove button to clear the selected Office.
 - a. If the Office value is stored in the database, display that value in the Office field.
 - b. Display all Units associated to the Department when no Office is selected.
 - c. Display all Sections in the County when no Office is selected.

2.1.4 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff Assignment List

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1022	The CONTRACTOR shall update the "Office" button on the Staff Assignment List page to be a non-mandatory field.	There are no other functional areas in the system that require the "Office" button to be mandatory.	Update the Staff Assignment List page so the Office field is no longer required and add a Remove button to clear the selected Office.



California Statewide Automated Welfare System

Design Document

DDID 1011 CA-207408 – Rename the Values of
the Worker Level Field on the Position Detail
Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Darren Goostree
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Initial	Darren Goostree
07/22/2019	1.1	Updated Migration Requirement to include missing items.	Melissa Mendoza

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1 OVERVIEW

1.1 Current Design

The Worker Level field of the Position Detail page describes where the Position exists within the county's staffing hierarchy. Rename some of the values of this field to support a 58-county solution, and update their ordering.

1.2 Requests

Per DDID 1011, rename some of the values of this field to support a 58-county solution.

1.3 Overview of Recommendations

Rename some of the values of the Worker Level field on the Position Detail page to support a 58-county solution. Update the ordering of the values in this field.

1.4 Assumptions

n/a

2 RECOMMENDATIONS

2.1 Position Detail

2.1.1 Overview

The Worker Level field of the Position Detail page describes where the Position exists within the county's staffing hierarchy. Rename some of the values of this field to support a 58-county solution, and update their ordering.

2.1.2 Position Detail Mockup

Position Detail

* - Indicates required fields

Save Save and Copy Cancel

General Position Information

Worker ID:
19LS960407

Office Name: *
Salinas Employment Services

Unit ID: *
04 00

Assignment Type Code:

Auto Assign Indicator:

Section: *
04

Position Status: *

Worker Level:

Max Case Load:

Figure 2.1.1 –Position Detail Mockup

2.1.3 Description of Changes

Rename some of the values in the Worker Level field of the Position Detail page as follows:

- Rename the "Supervisor" value to "1st Level Reception Log/Authorization"
- Rename the "Deputy" value to "2nd Level Reception Log/Authorization"
- Rename the "Director" value to "3rd Level Reception Log"
- Rename the "Unit Clerk" value to "1st Level Reception Log"
- Rename the "YBN Appointment Worker" value to "Self-Service Portal Appointment Worker"

Update the ordering of the values so they display in the following order:

- 1st Level Reception Log
- 1st Level Reception Log/Authorization
- 2nd Level Reception Log/Authorization
- 3rd Level Reception Log
- Eligibility Worker
- Self-Service Portal Appointment Worker

2.1.4 Page Location

Global: Admin Tools

Local: Office Admin

Task: Position

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1011	The CONTRACTOR shall update the following dropdown values in the "Worker Level" field on the Position Detail page: 1) Relabel "Supervisor" to "1st Level Reception Log/Authorization" 2) Relabel "Deputy" to "2nd Level Reception Log/Authorization" 3) Relabel "Director" to "3rd Level Reception Log" 4) Relabel "Unit Clerk" to "1st Level Reception Log" 5) Relabel "YBN Appointment Worker" to "Self-Service Portal Appointment Worker"	N/A	Worker Level field values renamed as described.



California Statewide Automated Welfare System

Design Document

CA-207417 DDID 938

Relabel "LRS Pers" to "Known to System" on the
ICT Detail page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Original	Melissa Mendoza
07/25/2019	1.1	2.1.1 ICT Detail Mockup title has been added per Deliverable Comments.	Melissa Mendoza

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1 OVERVIEW

1.1 Current Design

ICTs (Inter County Transfers) transfer a person's case information from one County to another. The ICT Detail page displays the information being transferred. The ICT Detail page has a section called All People Associated with the ICT. This section has a column name labeled "LRS Pers". This column identifies if the person on the ICT is known to the system.

1.2 Requests

Relabel "LRS Pers" to "Known to System" on the ICT Detail page.

1.3 Overview of Recommendations

DDID 938 requests that an update to the column name under the All People Associated with the ICT section from "LRS Pers" to "Known to System" on the ICT Detail page in CalSAWS.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 ICT Detail

2.1.1 ICT Detail Mockup

ICT Detail

*- Indicates required fields

View Documents

Incomplete ICT

Unlink

Edit

Close

Receiving County Information

ICT ID: 10191B2P369	County: * Los Angeles	Case Number 2074597
-------------------------------	---------------------------------	---

Sending County Information

Initiated Date: 08/18/2015	County: Fresno	Case Number 1B2P369
Notification Date: *		

▼ All People Associated with the ICT

Name	DOB	SSN	CIN	Requested	Known to System
Jordan Pope	10/04/1980	573-73-0422	98825422E	No	Yes

Figure 2.1.1 ICT Detail Mockup

2.1.2 Description of Changes

1. Update the column name in the All People Associated with the ICT section from LRS Pers to Known to System.
2. Update the Page Mapping to reference the new column name.

2.1.3 Page Location

Global Navigation: Case Info

Local Navigation: Case Summary

Task Navigation: ICT Summary

2.1.4 Security Updates

N/A

2.1.5 Page Mapping

Update the Page Mapping to reference the new column name "Known to System"

2.1.6 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
938	The CONTRACTOR shall relabel "LRS Pers" to "Known to System" on the ICT Detail page.	N/A	Update the column name from LRS Pers to Known to System.



California Statewide Automated Welfare System

Design Document

CA- 207418 DDID 937

Migrate the "Phonetic Search Results" checkbox
to default to "checked" on the Person Search
page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Melissa Mendoza
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/27/2019	1.0	Original	Melissa Mendoza
07/29/2019	1.1	Update Section 2.1 (all subsections) per Deliverable comments	Kristine Lim

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1 OVERVIEW

1.1 Current Design

The Person Search allows the User to search for people that are known to the system. There is a checkbox at the bottom of the page to search based on 'Include Phonetic Search Results'.

1.2 Requests

The checkbox for 'Include Phonetic Search Results' is not checked by default and the User is required to check it each time they do a search.

1.3 Overview of Recommendations

DDID 937 requests that we migrate the 'Include Phonetic Search Results' checkbox to default to "checked" on the Person Search page.

1.4 Assumptions

N/A

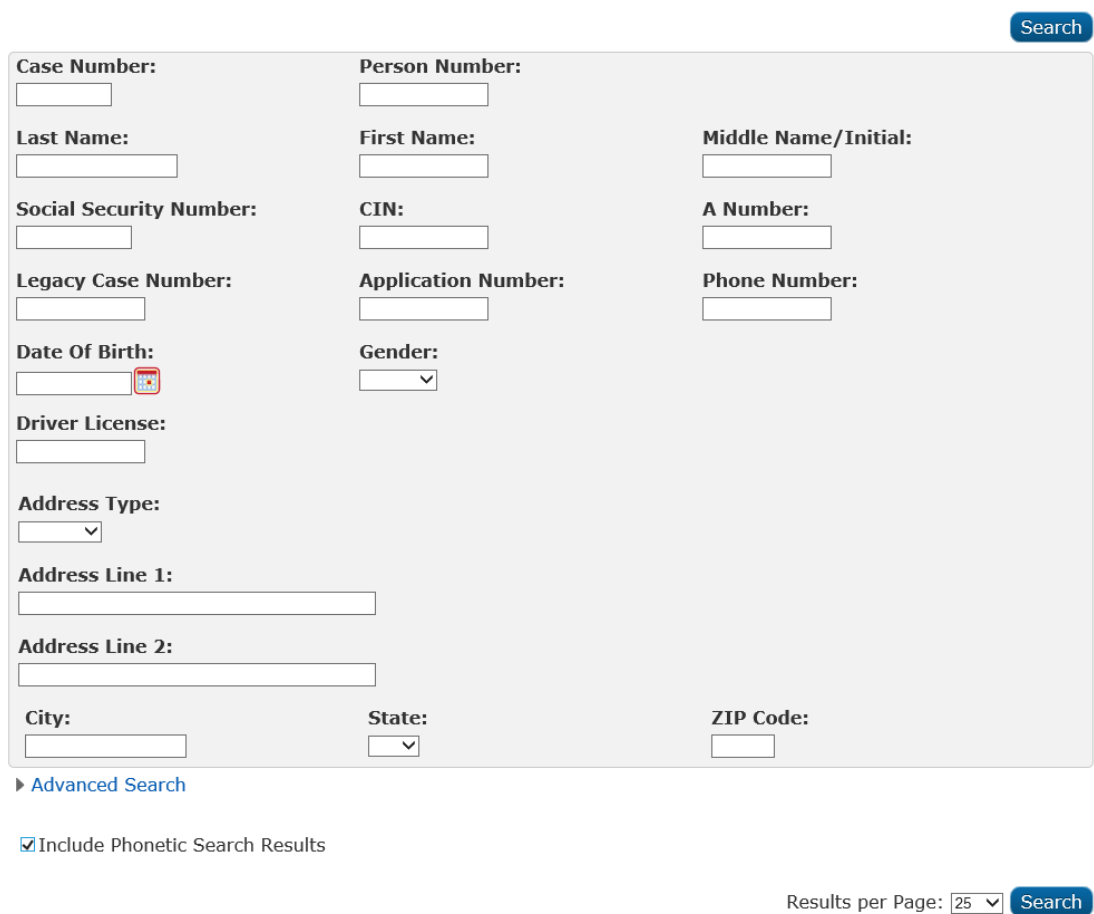
2 RECOMMENDATIONS

2.1 Person Search


2.1.1 Overview

The Person Search allows the User to search for people that are known to the system. There is a checkbox at the bottom of the page to search based on 'Include Phonetic Search Results'. Per DDID 937 requests that we migrate the 'Include Phonetic Search Results' checkbox to default to "checked" on the Person Search page.

2.1.2 Person Search Mockup



The mockup shows a search interface with a 'Search' button in the top right corner. The search criteria are organized into two columns. The left column includes fields for Case Number, Last Name, Social Security Number, Legacy Case Number, Date Of Birth (with a calendar icon), Driver License, Address Type, Address Line 1, Address Line 2, City, and State. The right column includes fields for Person Number, First Name, Middle Name/Initial, CIN, A Number, Application Number, Phone Number, Gender (a dropdown menu), and ZIP Code. Below the search criteria, there is a link for 'Advanced Search' and a checked checkbox for 'Include Phonetic Search Results'. At the bottom right, there is a 'Results per Page' dropdown set to '25' and another 'Search' button.

Case Number: <input type="text"/>	Person Number: <input type="text"/>	
Last Name: <input type="text"/>	First Name: <input type="text"/>	Middle Name/Initial: <input type="text"/>
Social Security Number: <input type="text"/>	CIN: <input type="text"/>	A Number: <input type="text"/>
Legacy Case Number: <input type="text"/>	Application Number: <input type="text"/>	Phone Number: <input type="text"/>
Date Of Birth: <input type="text"/> 	Gender: <input type="text"/>	
Driver License: <input type="text"/>		
Address Type: <input type="text"/>		
Address Line 1: <input type="text"/>		
Address Line 2: <input type="text"/>		
City: <input type="text"/>	State: <input type="text"/>	ZIP Code: <input type="text"/>

[Advanced Search](#)

☒ Include Phonetic Search Results

Results per Page: [Search](#)

Figure 2.1.2 Person Search Mockup

2.1.3 Description of Changes

Update the 'Include Phonetic Search Results' checkbox to default to "checked" on the Person Search page.

2.1.4 Page Location

Global Navigation: Case Info

Local Navigation: Case Summary

Task Navigation: Person Search

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
937	The CONTRACTOR shall migrate the "Phonetic Search Results" checkbox to default to "checked" on the Person Search page.	N/A	Update the "Include Phonetic Search Results" checkbox to default to "checked" on the Person Search page.



California Statewide Automated Welfare System

Design Document

CA-207424 – DDID 707 – CW 10 Wording Update

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Brian Furlong
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/22/2019	1.0	Original	Brian Furlong
07/24/2019	1.1	Update per DEL review – mock up updated and reattached	Brian Furlong
07/25/2019	1.2	Updated per draft DEL review – removed threshold language assumption. Form only available in English and Spanish	Brian Furlong

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1 OVERVIEW

CW 10 – Notice of Withdrawn Application (07/2001) – is sent to the participant to inform them that the County has withdrawn their application as they had previously requested.

1.1 Current Design

CW 10 lists General Relief as a program label.

1.2 Requests

Relabel General Relief to GA/GR.

1.3 Overview of Recommendations

General Relief label will be changed to GA/GR for English and Spanish versions of the CW 10.

Correct a misspelling on the Spanish language version of the form.

1.4 Assumptions

N/A

2 RECOMMENDATIONS

2.1 CW 10 – Notice of Withdrawn Application (07/2001)

2.1.1 Overview

CW 10 lists General Relief as a program label.

2.1.2 Description of Change

1. Update the General Relief label to GA/GR for English and Spanish versions of the CW 10.

English:

Before:

☐ CalWORKs/Refugee ☐ CAPI ☐ CalFresh ☐ General Relief

After:

☐ CalWORKs/Refugee ☐ CAPI ☐ CalFresh ☐ GA/GR

Spanish:

Before:

☐ CalWORKs/Refugiado ☐ CAPI ☐ Estampillas para comida ☐ Asistencia General

After:

☐ CalWORKs/Refugiado ☐ CAPI ☐ Estampillas para comida ☐ GA/GR

2. Update the word 'hacimos' to 'hicimos' in the Spanish version of the CW 10.

Before:

Debido a que usted lo pidió, nosotros lo **hacimos**.

After:

Debido a que usted lo pidió, nosotros lo **hicimos**.

2.1.3 Form Mockup - English

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

NOTICE OF WITHDRAWN APPLICATION

Date:
Case Name:
Case Number:
Worker Name:
Worker ID:
Worker Phone Number:
Customer ID:

You told us on _____ that you wanted the County to stop your application for:

☐ CalWORKs/Refugee

☐ CAPI

☐ CalFresh

☐ GA/GR

☐ Other _____

Because you asked, we did so.

You have the right to apply again at any time.

Worker Signature

Phone Number

Comments:

Although you have withdrawn your application, you and your family may be able to get family planning services. If you want help, ask the County or a family planning agency for more information.

CW 10 (7/01) REQUIRED FORM- SUBSTITUTES PERMITTED

Page 1 of 1

2.1.4 Form Mockup - Spanish

STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY

CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

NOTIFICACION DEL RETIRO DE LA SOLICITUD

Fecha:
Nombre del Caso:
Número del Caso:
Nombre del Trabajador:
Identificación del Trabajador:
Teléfono del Trabajador:
Número de Id del Cliente:

Usted nos dijo en _____ que quería que el Condado parara su solicitud para:

☐ CalWORKs/Refugiado

☐ CAPI

☐ Estampillas para comida

☐ GA/GR

☐ Otro _____

Debido a que usted lo pidió, nosotros lo hicimos.

Usted tiene derecho a presentar otra solicitud en cualquier momento.

Firma del trabajador

Número de teléfono

Comentarios:

Aunque ha retirado su solicitud, es posible que usted y su familia obtengan servicios de planificación familiar. Si necesita ayuda, pídale más información al Condado o a la oficina/agencia de planificación familiar.

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
707	The Contractor shall update form CW 10 (7/01)-Notice of Withdrawn Application as follows: 1) Relabel "General Relief" to "GA/GR"	N/A	Form re-labeled per requirement.