

CalSAWS

California Statewide Automated Welfare System

Design Document

DDID 398, 404, 1605, 1607

CA-207277 - Add Multi-County Login
Functionality

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1 OVERVIEW

1.1 Current Design

Current login functionality supports Los Angeles County logins.

The System supports two types of users, internal and external. Both types of users have an Oracle Internet Directory (OID) account. Internal users have an Active Directory id (AD) and an OID account. Their OID login account matches their AD id. The password resides in AD. External users only have an OID account and their password resides in OID. Their login authorization is done in OID.

C90 user is a "universal" user in C-IV. They have access to cases from all counties in the System. They can select the county they want to work with from a dropdown on the Homepage.

C92 users are also called "Oversight Agency" staff. They can be given access to one or more counties in the System while they are performing audits. Each C92 user has their own individual list of counties.

1.2 Requests

Per DDID 1605, add multi-county login functionality to support users from the migrating counties.

Per DDID 1607 (#2), migrate the C90 and C92 Login capability. The C90 and C92 account creation will continue to be created by the CONSORTIUM. The C92 County Access will continue to be controlled by the respective county administrators.

Per DDID 404, migrate the "Reset Password" button on the Security Assignment page when the Staff Type is set to Internal on the Staff Detail page for any of the counties that choose not to utilize the Active Directory option. Resetting a password, shall generate and send a Reset Password email to the staff for whom the password is being reset.

Per revised DDID 398, The CONTRACTOR shall remove the "Staff Type" field from the Staff Detail page. See "Migration Requirements" table at bottom of the document for more details.

1.3 Overview of Recommendations

- Add multi-county login functionality for users from the migrating counties, c90 and c92 users.
- Set a new Login Authorization option in CT15 so counties can choose between AD or OID clearance for their county users. Set all migrating counties with the OID option in R1. Set Los Angeles County with the AD option.
- For users from the migrating counties with OID Clearance and for c92 users, the login format will end in @CXX where CXX represents the County Code. The login format for c90 users will be their Active Directory Id.
- Display the "County" dropdown on the CalSAWS Homepage for c90, c92 and Regional Call Center users to select the county they are working with.
- Update Application Development staff from County Code 19 to 90 in staff table so they will now see the "County" drop-down on the Homepage.
- Update the Staff Detail page to support the creation and maintenance of users from counties other than Los Angeles County.
- Update the Security Assignment page to be the page to add users in OID and to search for the Active Directory Id for all counties going forward.
- Update the Oversight Agency Staff pages to support the creation and maintenance of c92 users.

1.4 Assumptions

- C-IV county users will be migrated as part of the CalSAWS Conversion scope.
- The migrated C-IV county users' training completion indicator will be set to Yes as part of the CalSAWS Conversion scope.
- The Oracle Internet Directory (OID) will continue to be used as of the 19.11 release.
- The "External" staff type flow creation is not used by Los Angeles County because all Los Angeles county users need to be added to the county's Active Directory.
- TechOps will provide the list of Application Development staff (developers and testers) to change their County Code from 19 to 90.

2 RECOMMENDATIONS

2.1 Multi-County Login

2.1.1 Overview

Current login functionality supports Los Angeles County logins. The System will now support multi-county login functionality for users from the migrating counties, for internal users (county 90) and for "Oversight Agency Staff" users (county 92).

2.1.2 Description of Changes

1. Create a new table reference column in CT15 category to store the counties' preference between OID or AD authorization. Set all migrating counties as OID for now. Set AD clearance for Los Angeles County.
2. The login authorization process will be validated in OID for all counties with the OID clearance in CT15. C92 users will also be validated in OID. The System will support password changes and resets for these users.
3. Counties with AD clearance in CT15 will be done in their county's own Active Directory such as Los Angeles County does today. For the 19.11 Release, only Los Angeles County will have AD clearance. Internal users (developers and testers) will continue to be validated in AD.
4. For counties with OID clearance in CT15, user names will follow the current C-IV user name format which ends in @CXX where CXX represents the County Code (e.g., San Bernardino user names will end in @C36).
5. Internal users (c90) will continue to log in with their Active Directory Id. Their user name will be tied to county 90 internally through the staff.county_code value of 90.
6. Counties with AD clearance in CT15 such as Los Angeles County will log in with their Active Directory Id.
7. Save the County Code in the user profile upon successful login as follows:
 - For c90 users, set the County Code to 36 (San Bernardino).
 - For c92 users, that will be the smallest County Code num identif value in extrnl_staff_county_stat table with an Active access status (e.g., if c92 user is given access to Calaveras (county 05) and San Bernardino (county 36) then save Calaveras county 05 in the user profile)
 - For all other users, continue to use the County Code value from staff table.
8. The CalSAWS Homepage will display a "County" dropdown for c90, c92 users and users assigned the "Regional Call Center Staff" or the "Regional Call Center Supervisor" security role. Populate the dropdown options as follows:
 - Show all counties supported in the System for c90 and Regional Call Center users. See Table 2.1.1 below for the list of counties. The list will include Los Angeles county, the migrating C-IV and CalWIN counties
 - Show all counties in extrnl_staff_county_stat table with an Active access status for the logged-in c92 user staff_id.

Table 2.1.1 – County Login Clearance

CODE_NUM_IDENTIF	COUNTY	LOGIN CLEARANCE
01	Alameda	OID
02	Alpine	OID
03	Amador	OID
04	Butte	OID
05	Calaveras	OID
06	Colusa	OID
07	Contra Costa	OID
08	Del Norte	OID
09	El Dorado	OID
10	Fresno	OID
11	Glenn	OID
12	Humboldt	OID
13	Imperial	OID
14	Inyo	OID
15	Kern	OID
16	Kings	OID
17	Lake	OID
18	Lassen	OID
19	Los Angeles	AD
20	Madera	OID
21	Marin	OID
22	Mariposa	OID
23	Mendocino	OID
24	Merced	OID
25	Modoc	OID

26	Mono	OID
27	Monterey	OID
28	Napa	OID
29	Nevada	OID
30	Orange	OID
31	Placer	OID
32	Plumas	OID
33	Riverside	OID
34	Sacramento	OID
35	San Benito	OID
36	San Bernardino	OID
37	San Diego	OID
38	San Francisco	OID
39	San Joaquin	OID
40	San Luis Obispo	OID
41	San Mateo	OID
42	Santa Barbara	OID
43	Santa Clara	OID
44	Santa Cruz	OID
45	Shasta	OID
46	Sierra	OID
47	Siskiyou	OID
48	Solano	OID
49	Sonoma	OID
50	Stanislaus	OID
51	Sutter	OID
52	Tehama	OID

53	Trinity	OID
54	Tulare	OID
55	Tuolumne	OID
56	Ventura	OID
57	Yolo	OID
58	Yuba	OID

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9. Default the selected value in the "County" dropdown as follows:
- "36 – San Bernardino" for c90 users
 - County Code value in staff table for the logged-in staff_id for user assigned to one of the Regional Call Center system managed roles
 - Smallest County Code in extrnl_staff_county_stat table where status is Active for c92 users

10. When user selects a different option in the "County" dropdown and clicks "Submit" button on the Homepage then update the County Code value in the user profile.

11. Display the County name from the user profile on the Homepage under the LRS logo in the top left corner of the page. See mockup of Homepage below.

12. Display "Change password" button on the Homepage when the following criteria is met:

- login status is Active and staff.activ_dir_user_name is not Null
- and
- Staff.county_code is a county with OID clearance in CT15
- and
- It has been four days since the user has changed the password

Note: password resets for counties with AD clearance will be done externally in the County's own Active Directory.

13. Display the message "Your password will expire in x days." on the Homepage when the following criteria is met:

- login status is Active and staff.activ_dir_user_name is not Null
- and
- Staff.county_code is a county with OID clearance in CT15
- and

- The password is less than 16 days from expiring.

14. Display the “Change Password” page upon clicking the “Change Password” button and allow users to save the new password in OID.

15. Enforce existing password rules from C-IV for users from counties other than Los Angeles County when resetting passwords which are:

- Must not be the same as the last 24 passwords
- Exclude all or part of the User Name
- Exclude keyboard patterns, keys listed next to each other vertically or horizontally on a standard keyboard
- Exclude commonly used words, or words written backwards or disguised with special characters
- Must contain at least eight characters (spaces count as characters)
- Must contain at least four unique characters and each character must not be repeated more than three times
- Must contain characters from all of the following four categories:
 - Upper Case characters
 - Lower Case characters
 - Numerals
 - Special Characters (the <, > characters are not accepted)

LRS Journal Help Resources Page Mapping Images DCFS Images Log Out

San Bernardino Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Welcome, Test User! SAN BERNARDINO Thursday, May 02, 2019

Worker ID: County: Case Number:

Announcements	Type	Date	LRS Quick Links
Release 17.11.0.05-Release Notes	LRS		Reception Log
Release Note Report	LRS		Reminders



My Tasks

My Schedule

My Assignments

My Reminders Due Date

LRS Business Intelligence

[DPSSTATS Data Warehouse Homepage](#)

Figure 2.1.1 - Homepage c90 Logged-in User

LRS
Los Angeles

Journal Help Resources Page Mapping Images DCFS Images Log Out

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

Welcome, Test User! Thursday, May 02, 2019

Worker ID* 90AS9090RG Submit Case Number: Submit

Announcements	Type	Date	LRS Quick Links
Release 17.11.0.05-Release Notes	LRS		Reception Log Reminders
Release Note Report	LRS		



My Tasks

My Schedule

My Assignments

My Reminders Due Date

LRS Business Intelligence
DPSSTATS Data Warehouse Homepage

Figure 2.1.2 - Homepage c19 Logged-in Internal User

Figure 2.1.3 - Homepage c36 Logged-in User

2.1.3 Page Location: Homepage

Global Navigation: N/A

Local Navigation: N/A

Task Navigation: N/A

2.1.4 Security Updates

N/A

2.1.5 Page Mapping

Change page name from "C-IV" to "Homepage" in page mapping table.

2.1.6 Page Usage/Data Volume Impacts

N/A

2.2 Staff Detail Page

2.2.1 Overview

- When Staff Type selected option is "Internal" on the Staff Detail page, users must select the Active Directory id to tie the new staff record to the existing AD account. Upon saving, an account is created in OID identical to the Active Directory Id selected. The OID login id is then saved in `staff.activ_dir_user_name`. The flow for the "External" Staff Type saves Null in `staff.activ_dir_user_name`. To create a login account, users must click on the "Add User Name" button on the Security Assignment page. This creates an OID account with user name format ending in `@c19.laclrs.org`.
- The Active Directory ID search step and OID account creation will be moved to the Security Assignment page.
- The Staff Detail page will insert the new record in the staff tables after which the user will go to the Security Assignment page to set up the OID login account.

Note: Per existing C-IV functionality, c92 users will be created in the "Oversight Agency Staff" pages. See Recommendation 2.4 for details.

2.2.2 Description of Changes

1. The OID account creation will be taken care of on the Security Assignment page going forward. Remove the Active Directory ID search and OID account creation logic from Staff Detail page. Save Null in `staff.activ_dir_user_name` when creating new staff records for all counties.
2. Remove the "Staff Type" dropdown from the page. For Los Angeles County, all users have an internal staff type because they require an Active Directory Id. For other counties, the staff type created will follow the county's preference set in CT15. For OID clearance counties, save the staff type as external. For AD clearance counties, save the staff type as internal.
3. Remove the Active Directory Id Select button from the page as no longer needed. The search for the AD Id will now happen on the Security Assignment page for all counties with AD clearance such as Los Angeles County. See the mockup below of the Staff Detail page for Los Angeles County.
4. Make the "Employee Number" field non mandatory and remove the existing format constraint so the field can be used by all counties.
5. Same as Los Angeles County, save the Training completion indicator as 'N' in the staff table for new users from the migrating counties. This field is editable on the Security Assignment page.

6. The Staff Search page already supports the search for staff records across other counties with a "County" dropdown visible to all users. Display "Add Staff" and "Remove" button on the Staff Search page when the user has the StaffDetailEdit security right and the county in the user profile is the same as the county of the Staff Detail record being accessed, regardless of they are in the same county or not after the Search Results have displayed.
7. Display "Edit" button and "Update" button checkbox(es) on the Staff Search page only when the user has the StaffDetailEdit security right and the user is from the same county after the Search Results have displayed.
8. Display "Edit" and "Save" buttons on the Staff Detail page only when the county in the user profile is the same as the county of the Staff Detail record being accessed.

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Staff Detail

*- Indicates required fields

Save

Cancel

General Staff Information

First Name:	Middle Name:	Last Name: *	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Staff Status Code: *	Classification Title: *	Employee Number:	Staff ID:
<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text"/>	<input type="text"/>

Spoken Language Information

Spoken Language *	Proficiency *	Certification	Accept Cases	Begin	End	
<input type="text" value="- Select -"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>			

Written Language Information

Written Language	Proficiency	Certification	Begin	End	
<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

E-mail Address Information

E-mail Address *	E-mail Type *
<input type="text"/>	<input type="text" value="- Select -"/>
<input type="button" value="Add"/>	

Assignment Information

Date	Type
No Data Found	

Save

Cancel

Figure 2.2.1 - Staff Detail page for all counties (Staff type field removed and Employee Number field is optional)

2.2.3 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff

2.2.4 Security Updates

N/A

2.2.5 Page Mapping

Remove the "Staff Type" field from page mapping for the Staff Detail page and update the "Employee Number" description to say it is an optional field.

2.2.6 Page Usage/Data Volume Impacts

N/A

2.3 Security Assignment Page

2.3.1 Overview

- Users navigate to the Security Assignment page by clicking the "Security Assignment" button on the Staff Detail page.
- Users will now be able to search for the Active Directory Id on this page.
- The "Reset Password" button will only be visible when the staff record belongs to a county with an OID clearance in CT15.

Note:

- Same as C-IV, c92 users will be created in the Oversight Agency Staff pages. See Recommendation 2.4 for details.
- Enabling Multi-County Login functionality with this SCR will allow the field "Regional Call Center" to display for counties other than Los Angeles (19). The Regional Call Center field will be added for all counties with DDID 405 and DDID 309, currently planned for the 20.03 release.

2.3.2 Description of Changes

1. Continue to display the "Add User Name" button only when `staff.activ_dir_user_name` is Null for the staff record displayed on the page.
2. Navigate the user to the existing "Active Directory Search" page upon clicking the "Add User Name" button if any of the following criteria is met:
 - the staff record belongs to a county with an AD clearance in CT15 such as Los Angeles County
OR
 - `Staff.county_code` is equal to 90
3. The "Active Directory Search" page will continue to support the search for an Active Directory Id either by Name or by Login as per existing functionality.

Security Assignment

*- Indicates required fields

Edit

Close

Security Profile

Staff Name:

Sam LATEST

Add User Name

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

Edit

Close

Figure 2.3.1 - Security Assignment page - OID login id is Null for Los Angeles County staff record

- The page will display the existing validation message when attempting to assign security roles or groups to a user without an active user name:
 - "Failed to Add Roles to User. The Participant is not an Active Worker."
- Should user click "Cancel" button on the "Active Directory Search" page, navigate the user back to the Security Assignment page and display the "Add User Name" button again as shown in mockup above.

Active Directory Search

*- Indicates required fields

Search

Refine Your Search

Search By: *

Name

Last Name:

LATEST *

First Name:

Sam *

Middle Name:

Results per Page: 25

Search

Select

Cancel

	Name	Login
<input type="radio"/>	Sam LATEST	E123456

Select

Cancel

Figure 2.3.2 - Active Directory Search page with Search Results Returned

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- When user clicks the "Select" button on the Active Directory Search page then navigate user back to the Security Assignment page in View mode and populate the "User Name" field with the Active Directory Id selected and show the Login Status field as Active. See mockup below.

Note, same as the "Add User Name" button today, the "Search" and "Select" buttons on the Active Directory Search page will be visible to all users who have access to the Security Assignment page. There will be no additional security right needed.

Security Assignment

* - Indicates required fields

Edit Close

Security Profile		
Staff Name: Bob Test	User Name: E1234567	Last Login Date:
Login Status: *	Password:	Training Complete:
Active		Yes

Assigned Security Roles
No Data Found

Assigned Security Groups
No Data Found

Edit Close

Figure 2.3.3 - Security Assignment page after selecting an Active Directory Id for Los Angeles County and saving

- When user opens the Security Assignment page in View mode and the login status is Active, then hide the "Reset Password" button and Password field if any of the following criteria is met:
 - the staff record belongs to a county with an AD clearance in CT15 such as Los Angeles County
 - OR
 - Staff.county_code is equal to 90

The System does not manage Active Directory passwords.

- Display the Reset Password button on the Security Assignment page in View mode when all of the following criteria is met:

- a. The Staff record belongs to a county with OID clearance in CT15.
- b. The User Name (staff.activ_dir_user_name) is not Null.
- c. The Login Status is "Active".

9. Display the Remove button next to the User Name on the Security Assignment page in Edit mode when the following criteria is met:

- a. The Staff record belongs to a county with AD clearance in CT15.
- b. The User Name (staff.activ_dir_user_name) is not Null.

Security Assignment

* - Indicates required fields

Copy Security Profile Save Cancel

Security Profile		
Staff Name: Bob Test	User Name: E1234567 Remove	Last Login Date:
Login Status: * Active ▼	Password: *****	Training Complete: Yes ▼

Assigned Security Roles
Add Security Role

Assigned Security Groups
Add Security Group

Copy Security Profile Save Cancel

Figure 2.3.4 - Security Assignment page in Edit mode for a AD County staff with user name

10. Generate OID login account and temporary password upon clicking the "Add User Name" button when the staff.county_code value is a county with OID clearance in CT15. The value for Login Status will be "Active" and the value for Training Complete will be "Yes".
11. Update OID user name format to end in @CXX where CXX represents the County Code for counties with OID clearance.
12. Show the "Reset Password" button on the page when the following criteria is met:
 - login status is Active and staff.activ_dir_user_name is not Null
 - and
 - Staff.county_code is a county with OID clearance in CT15

Security Assignment

* - Indicates required fields

Edit

Close

Security Profile

Staff Name: Unit Test	User Name: unit.t@C36	Last Login Date:
Login Status: * Active	Password: 2gk7#0j@ <input type="button" value="Reset Password"/>	Training Complete: Yes
Regional Call Center:		

Assigned Security Roles

No Data Found

Assigned Security Groups

No Data Found

Edit

Close

Figure 2.3.4 - Security Assignment page in View mode immediately after clicking "Add User Name"

13. The temporary password email sent upon clicking the "Reset Password" button utilizes the URLs in CT15 in reference table 34. Update for the C-IV migrating counties so they match the latest values in C-IV.

14. Customize the temporary password email verbiage so it will include the county's non-managed URLs such as <https://www.cXX.e-iv.net> for the C-IV migrating counties where password will be reset through the System.

Refer to County urls.xls spreadsheet for the list of urls valid at this time. During Build, developers will need to get the latest list from the Database.

Use the existing C-IV password email template for password resets, replacing references with CalSAWS System as follows:

This e-mail contains instructions to access the CalSAWS System with your CalSAWS User Name and Temporary Password which you will use to log in. Please do not reply to this e-mail. DO NOT DELETE THIS E-MAIL UNTIL AFTER YOU LOG IN TO THE CALSAWS SYSTEM WITH THIS TEMPORARY PASSWORD.

To access the CalSAWS System you will need to perform the following steps:

- If you have a CalSAWS workstation, you will access the CalSAWS System by double-clicking on the CalSAWS System Application icon located on the desktop on your CalSAWS workstation. This will take you to [https://S\\$countyUrl](https://S$countyUrl) <https://web.calsaws.net>.
- If you do not have a CalSAWS workstation, you will access the CalSAWS System through Internet Explorer by using the following URL: [https://www.cS\\$countyCode}.e-iv.net](https://www.cS$countyCode}.e-iv.net)

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<https://www.calsaws.net/>. For quicker access in the future, you can add the CalSAWS System address to your favorites list.

Once the CalSAWS System appears in the Internet Explorer browser, you will be prompted to enter your CalSAWS User Name and Temporary Password given below.

CalSAWS User Name: \${login}

Temporary Password: \${temporaryPassword}

NOTE: When you use the temporary password, you must match the lower and upper case letters as they are written above. It is suggested that you copy and paste the temporary password.

The next time you log in to the CalSAWS System using the provided temporary password, you will be asked to change your password. In the event you forget your CalSAWS System password, follow your county process to reset your password.

If you have any questions about the log in process or the CalSAWS System, please contact your Help Desk or Supervisor.

15. In Edit mode, make the "Training Complete" field also be editable on the Security Assignment page for the migrating counties. See mockup below.

Commented [GA1]: Is this needed?

We will be removing this field in R3 with DDID 1608.

My assumption is since we did not capture DDID 1608 in this SCR, we will need to leave this in, until that change can be implemented in R3, is that correct?

Security Assignment

*- Indicates required fields

Copy Security Profile

Save

Cancel

Security Profile		
Staff Name: Sam Test	User Name: test.s@C36	Last Login Date:
Login Status: * Active ▾	Password: *****	Training Complete: Yes ▾
Regional Call Center: ▾		

Assigned Security Roles	
	Add Security Role

Assigned Security Groups	
	Add Security Group

Copy Security Profile Save Cancel

Figure 2.3.5 - Security Assignment page in Edit mode for counties with OID clearance

- Extend the existing check for training completion that happens upon login. If the training is not complete, the System will not allow users to login and will display the following validation message: "Unable to login to CalSAWS because required training is not complete. Please contact your supervisor." Update the existing message to refer to "CalSAWS" instead of "LRS".

Commented [GA2]: Same as above. Training Complete field is being removed from CalSAWS with DDID 1608 in R3.

Is this still needed for R1 to accomplish business?

2.3.3 Page Location

Global Navigation: Admin Tools

Local Navigation: Office Admin

Task Navigation: Staff

Click "Security Assignment" button on Staff Detail page in View mode to navigate to the Security Assignment page.

2.3.4 Security Updates

- Add and update URLs in secure_url table as needed for the Active Directory Id search on the page
- Map these URLs to "SecurityAssignmentView" security right instead of "StaffSearch". This is the same right that protects the "Security Assignment" button on the Staff Detail page.

2.3.5 Page Mapping

N/A

2.3.6 Page Usage/Data Volume Impacts

N/A

2.4 Create C92 Users on the Oversight Agency Staff Pages

2.4.1 Overview

- In C-IV Oversight Agency Staff users have County Code 92 in staff table. C92 users perform audits on one or more counties and therefore require access to see these counties' cases in the System. When they login, they can choose the county to work with the "County" dropdown on the Homepage.
- C92 users can only be created by c90 users.
- The Oversight Agency Staff Search and Detail pages already exist in LRS today though they do not support adding new c92 user.
- The System will allow c90 users to create new c92 users and to activate their access to one or more counties, including Los Angeles County.
- The System will support c92 users' login and support their password resets.

2.4.2 Description of Changes

1. Display "Add Staff" and "Edit" buttons on the Oversight Agency Staff Search page only to c90 users with the "OversightAgencyStaffSearchEdit" security right so they can create c92 users and update them.

See mockup below of the Oversight Agency Staff Search page.

LRS
Assembly Test 2

Journal Help Resources Page Mapping Images DCFS Images Log Out

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

Admin

Flag
County Announcement
County Security Roles
Audit
Oversight Agency Staff
Correspondence
Campaign

Oversight Agency Staff Search

Search

Staff Name: Classification: Status: Active

Begin Date: 06/20/2019 End Date:

Results per Page: 25 Search

Figure 2.4.1 - Oversight Agency Staff Search page before running a search

The screenshot shows the LRS Oversight Agency Staff Search page. The top navigation bar includes 'LRS Assembly Test 2' and various utility links like Journal, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. Below this is a secondary menu with categories such as Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The main content area is titled 'Oversight Agency Staff Search' and features a 'Refine Your Search' link. A 'Search Results Summary' box indicates 'Results 1 - 16 of 16' and includes an 'Add Staff' button. Below this is a table listing staff members with columns for Staff Name, Classification, Status, Begin Date, and End Date. Each row has an 'Edit' button. The table lists 16 staff members, including Arnulfo Willie, Charlotte Maese, Dedra Corwin, Djane Vanfossen, Elva Bryant, Holgar Dawnsong, Jayden Hibbler, Leanora Stryker, Logazor Skycut, Marlys Mehaffey, Martin King, Missy Degraff, Morag Windaxe, Roberto Boger, Steven Needham, and Vanesa Bertelsen.

Staff Name	Classification	Status	Begin Date	End Date	
Arnulfo Willie	Medi-Cal Auditor	Active	01/03/2013		Edit
Charlotte Maese	Other External Agency	Active	12/11/2013	01/01/2014	Edit
Dedra Corwin	Medi-Cal Auditor	Active	01/03/2013		Edit
Djane Vanfossen	CalFresh Auditor	Active	01/08/2014	04/08/2014	Edit
Elva Bryant	Medi-Cal Auditor	Active	10/11/2013	11/27/2013	Edit
Holgar Dawnsong	CalFresh Auditor	Active	10/03/2013	01/31/2014	Edit
Jayden Hibbler	CalFresh Auditor	Active	03/14/2013	04/02/2013	Edit
Leanora Stryker	Medi-Cal Auditor	Active	03/14/2013	04/02/2013	Edit
Logazor Skycut	Medi-Cal Auditor	Active	10/03/2013	01/31/2014	Edit
Marlys Mehaffey	CalFresh Auditor	Active	12/10/2013	02/28/2014	Edit
Martin King	CalFresh Auditor	Active	06/15/2012	09/28/2012	Edit
Missy Degraff	CalFresh Auditor	Active	02/03/2014	05/01/2014	Edit
Morag Windaxe	CalFresh Auditor	Active	03/14/2013	04/02/2013	Edit
Roberto Boger	CalFresh Auditor	Active	04/09/2013	06/30/2013	Edit
Steven Needham	Other External Agency	Active	01/13/2014	03/31/2014	Edit
Vanesa Bertelsen	IEVS Auditor	Active	02/13/2012	02/21/2012	Edit

Figure 2.4.2 - Oversight Agency Staff Search page with search results viewed by c90 users

2. The "Add Staff" and "Edit" buttons will navigate user to the Oversight Agency Staff Detail page.
3. Upon saving a new c92 user on the page, generate OID login account with user name format ending in @C92 same as C-IV.
4. Upon saving a new c92 user, save Null Employee Number, Training complete indicator set to 'Y' and external Staff Type. Insert an Active staff login record in staff_login table.

High dated records are initially added in existing extrnl_staff_county_stat table for the new staff record with an Inactive access for all counties

supported in the System and Begin Date set to the System date. Refer to Table 2.1.1 above for the list of counties.

Oversight Agency Staff Detail

* - Indicates required fields

Save Cancel

General Staff Information

First Name: * Middle Name: Last Name: * Suffix:

Classification Title: * Staff ID:

E-mail Address: *

Comments:

Security Profile

User Name: Login Status: Password:

County Access

Status	Begin Date	End Date	Updated By
No Data Found			

Save Cancel

Figure 2.4.3 - Oversight Agency Staff Detail page in Create mode

After clicking Save, the page will refresh in View mode with the login status showing "Active", the temporary password displayed and the County Access details with an Inactive status. Display an "Activate" button to allow user to access the County's cases.

5. Upon clicking the "Activate" button, end date the Inactive access record in extnrl_staff_county_stat table with system date and insert a new high dated Active access record with system date as the begin date. the page will open with the End Date of the latest Inactive record set to the current date and the Updated By set to the staff_id of the currently logged in user; a new row with an Active status, the Begin Date set to the current date, and an editable date field in the End Date column; and the Save buttons visible at the top and bottom of the page. Clicking the save button will update the records appropriately in the database. If a value is

not entered for the End Date of the new Active status, that status will be high_dated. If a value is entered for the End Date of the new Active status, then upon saving the page an additional Inactive status will be generated beginning on the day after the End Date specified for the Active status going on to high_date, as per our normal continuous effective-dating policy.

6. Display the "Edit" and "Save" buttons on the Oversight Agency Staff Detail page only to c90 users with the OversightAgencyStaffDetailEdit" security right.

Oversight Agency Staff Detail

*- Indicates required fields

Edit

Close

General Staff Information

First Name: *	Middle Name:	Last Name: *	Suffix:
Test		Test	
Classification Title: *	Staff ID:		
CalFresh Auditor	282713		
E-mail Address: *			
test@gmail.co6			
Comments:			

Security Profile

User Name:	Login Status:	Password:
test.t4@C92	Active	n875G,T,

County Access

Status	Begin Date	End Date	Updated By
Inactive	06/25/2019		279553

Activate

Edit

Close

Figure 2.4.4 - Oversight Agency Staff Detail page after clicking Save

7. When the county access is active and the page is in View mode, display the "Deactivate" button. Protect the "Activate" and "Deactivate" buttons on the page with "OversightAgencyStaffAccess" security right.
8. Upon clicking the "Deactivate" button, end date the Active access record in extrnl_staff_county_stat table with system date and insert a new high dated Inactive access record with System date as the begin date.

Oversight Agency Staff Detail

*- Indicates required fields Edit Close

General Staff Information

First Name: * Arnulfo	Middle Name:	Last Name: * Willie	Suffix:
Classification Title: * Medi-Cal Auditor	Staff ID: 239459		
E-mail Address: * johndoe@c-iv.org			
Comments:			

Security Profile

User Name: johndoe_246568	Login Status: Inactive	Password: Reset Password
-------------------------------------	----------------------------------	---

County Access

Status	Begin Date	End Date	Updated By
Inactive	12/01/2011	01/03/2013	7945
Active	01/03/2013	06/18/2019	249634
Inactive	06/18/2019		249634

Activate

Edit Close

Figure 2.4.5 - Oversight Agency Staff Detail page in View mode

9. When the page is in "Activate" mode, the End Date field will become editable and "Save" button will be displayed. Protect the "Save" button with the "OversightAgencyStaffAccess" security right in "Activate" mode. See mockup below for page in Activate mode.

Oversight Agency Staff Detail

* - Indicates required fields

Save

Cancel

General Staff Information

First Name: * Arnulfo	Middle Name:	Last Name: * Willie	Suffix:
Classification Title: * Medi-Cal Auditor	Staff ID: 239459		
E-mail Address: * johndoe@c-iv.org			
Comments:			

Security Profile

User Name: johndoe	Login Status: Active	Password:
------------------------------	--------------------------------	------------------

County Access

Status	Begin Date	End Date	Updated By
Inactive	12/01/2011	01/03/2013	7945
Active	01/03/2013	06/18/2019	249634
Inactive	06/18/2019	06/18/2019	249634
Active	06/18/2019	<input type="text"/>	

Save

Cancel

Figure 2.4.6 - Oversight Agency Staff Detail page in Activate mode

10. In Activate mode, if the County Access End Date entered or selected is in the past, display the following validation message:

“End Date - The Active status End Date must be today or later.”

11. The first name, middle name, last name, classification title and email address fields are all editable on the Oversight Agency Staff Detail page in Edit mode.

12. When page is in Edit mode, protect the "Save" button with the "OversightAgencyStaffDetailEdit" security right.
13. Display the "Reset Password" button in View mode if the login status is Active and staff.activ_dir_user_name is not Null. Hide the "Reset Password" button if the user has just clicked "Activate" button. Protect the button with the "OversightAgencyStaffDetailEdit" security right.

14. Same as C-IV today, the temporary password email will provide the San Bernardino county url in CT15 for c92 users password resets.

15. The temporary password emails sent for Oversight Agency Staff will be updated to replace references to LRS with CalSAWS and to replace the old URLs with the new CalSAWS URLs, same as the temporary password email for regular Staff is updated under 2.3.2.14.

2.4.3 Page Location

Global Navigation: Admin Tools

Local Navigation: Admin

Task Navigation: Oversight Agency Staff

2.4.4 Security Updates

Create an STCR to add missing URLs in secure_table from the two Oversight Agency Staff pages and map them to the appropriate security right in secure_url_right table as described in Recommendation 2.4.2 above.

2.4.5 Page Mapping

N/A

2.4.6 Page Usage/Data Volume Impacts

N/A

2.5 Change Application Development Staff to County 90 Users

2.5.1 Overview

- Today Application Development staff (developers and testers) have County Code 19 in staff table. They only have access to Los Angeles County's cases.

- Update their County Code to 90 so they will be able to test system changes with any county of their choice using the "County" dropdown on the Homepage.

2.5.2 Description of Changes

1. For Production environment access:
 - I. Create a data change request (DCR) to update existing Application Development staff records with an Active staff login status as follows:
 - Change County Code from 19 to 90 in the staff table
 - Set the Training Complete Indicator to 'Y' in the staff table
 - Update staff.activ_dir_user_name to match their calsaaws.org domain names
 - II. Create an Idif file to add new usernames for app dev staff in AWS OID that match their calsaaws.org domain names.
 - III. Authenticate app dev users against CalACES AD.
2. Update the script that recreates Application Development staff records after a database refresh of the Test environments as follows:
 - Insert a staff record for County Code 90
 - Set the staff.active_dir_user_name to match their calsaaws.org domain name
 - Set the Staff Type as internal in staff table
 - Set Training Complete Indicator to 'Y' in staff table
3. Update the internal process for giving access to the System to new joiners on the project as follows:
 - Insert a new staff record with County Code 90 in staff table
 - Set staff.type_code as Internal
 - Set staff.train_compl_ind as 'Y'
 - Set their staff.activ_dir_user_name to match their calsaaws.org domain name
 - Once the new user is added to the staff tables then the project security administrators will follow these steps in the System:
 - i. Navigate to the Security Assignment page and click the "Add User Name" button
 - ii. Search for the Active Directory Id for the new joiner
 - iii. Click "Save" on the Security Assignment page

2.5.3 Page Location

N/A

2.5.4 Security Updates

N/A

2.5.5 Page Mapping

N/A

2.5.6 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1605	The CONTRACTOR shall migrate the C-IV multi-county log in functionality.	N/A	Multi-county login functionality added.

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1607	<p>The CONTRACTOR shall update the Security Roles as follows:</p> <p>1) Migrate the C-IV Project maintained Security Roles and each CONSORTIUM County maintained security roles</p> <p>2) Migrate the C90 and C92 Login capability. The C90 and C92 account creation will continue to be created by the CONSORTIUM. The C92 County Access will continue to be controlled by the respective county administrators</p> <p>3) Generate a list of the new security rights and groups for the 58 County Security Administrators to assign out to the appropriate staff</p>	<p>Original:</p> <ul style="list-style-type: none"> • Oversight Agency Access will continue to be determined and administered by the respective counties. • The County Administrators will assign out security to their staff. <p>Revised:</p> <ul style="list-style-type: none"> • Oversight Agency Access will continue to be determined and administered by the respective counties. • The County Administrators will assign out security to their staff. • CONSORTIUM County maintained security roles referenced in #1 will be addressed through the Conversion data mapping and build effort • The list of new security rights and groups (#3) will be generated through the Conversion build effort 	<p>Update internal process for adding c90 users to the System.</p> <p>Update Oversight Agency pages to support c92 user creation and maintenance.</p> <p>CA-207275 will address the following:</p> <p>Migrate C-IV Project maintained security roles with County Code 90 and their security group associations. C90 System Administrator will be created with all groups in LRS. C90 View Only role will be created with all "View Only" groups in LRS.</p>

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
398	<p>Original: The CONTRACTOR shall update the "Staff Type" field on the Staff Detail page to be a non-mandatory field.</p> <p>Revised: The CONTRACTOR shall remove the "Staff Type" field from the Staff Detail page.</p>	<p>Original: There are no other functional areas in the system that require this field to be mandatory.</p> <p>Revised: The "Staff Type" value will be derived from the County's OID or Active Directory login clearance.</p>	<p>The Staff Type database field is Nullable.</p> <p>The field value will be driven by the new County login authorization preference in CT15 for the migrating counties.</p>
404	<p>The CONTRACTOR shall migrate the "Reset Password" button on the Security Assignment page when the Staff Type is set to Internal on the Staff Detail page for any of the counties that choose not to utilize the Active Directory option. Resetting a password, shall generate and send a Reset Password email to the staff for which the password is being reset for.</p>	<p>The reset password security already exists. The logic used for the external staff is the same as what is currently in C-IV for all Staff. The reset password functionality will be available for all users in the C-IV Counties</p>	<p>Support Reset Password functionality for the migrating counties on the Security Assignment page.</p>

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-207375 DDID 1098– Add Change Reason
Functionality on the [Program Name] EDBC
Summary Page

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

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/07/2019	1.0	Initial Document	Yale Yee

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1 OVERVIEW

1.1 Current Design

The Apply Date is determined by EDBC and can be viewed after the EDBC is processed. A reason is not displayed to describe why a given Apply Date was assigned. Apply Dates, that have been determined and finalized after the user authorizes an EDBC, can be viewed on the Change Reason Detail page using the following navigation:

Run EDBC -> Change Reason List -> Change Reason Detail.

Run EDBC

*- Indicates required fields

Change Reason

Run EDBC

Cancel

Benefit Processing Range:

Begin Month: *

02/2017

End Month: *

07/2017

Program	Status	Timely Notice Exception	Reason	Run Reason
---------	--------	-------------------------	--------	------------

Figure 1.1.1 – Change Reason button on Run EDBC page

Change Reason List

Close

Search Results Summary Results 1 - 2 of 2

Evaluated: Display From: * To: * View

Type	Change Reason	Report Date	Begin Date	End Date	Evaluated	
Income Amount Detail	Participant Provided - Verbal	01/01/2018	01/01/2018		No	Edit
Household Status Detail	Participant Provided - Verbal	01/01/2018	01/01/2018		No	Edit

Close

Figure 1.2.1 – Change Reason List page

Change Reason Detail

* - Indicates required fields

[View History](#) [Edit](#) [Close](#)

Type:
Citizenship Status Detail

Begin Date:
02/20/2017

End Date:

Change Reason: *
Participant Provided - Verbal

Report Date: *
02/20/2017

Program Evaluation

Case	Program	Status	Apply Date
No Data Found			

Figure 1.3.1 – Change Reason Detail page before EDBC is finalized

Change Reason Detail

* - Indicates required fields

[View History](#) [Close](#)

Type:
Income Amount Detail

Begin Date:
01/01/2018

End Date:

Change Reason: *
Participant Provided - Verbal

Report Date: *
01/01/2018

Program Evaluation

Case	Program	Status	Apply Date
L08B389	CalFresh	Applied	01/01/2018

Figure 1.4.1 – Change Reason Detail page after EDBC is finalized

1.2 Requests

The user will be able to review the Change Reason information during the Accept and Save process. The EDBC will display additional information on the reason the change, that occurs during the benefit month(s) being processed, was or was not applied on an EDBC.

1.3 Overview of Recommendations

1. A Change Reason button will be displayed on the [Program Name] EDBC Summary page for Change Reason programs.
2. A new page will be created to display the list of change reasons when an EDBC is processing.
3. The new page and existing Change Reason List page will display the reason a change was or was not applied.

1.4 Assumptions

1. SCR CA-47277, CalWORKs ACIN I-13-16 and ACL 16-90- Benefits for Deceased Child, will introduce certain functionality that will affect Change Reason logic.
2. A separate SCR, CA-208904 – Update Change Reason Functionality to Track Apply Dates for Household Status Changes, will be created to implement Apply Date reasons related to household status. The Apply Reasons of Beneficial Type 3 will be available for household compilation changes only.
3. The new Change Reason button will use the existing Security Groups tied to the Change Reason button on the Run EDBC page.

2 RECOMMENDATIONS

2.1 Add Change Reason Button to the [Program Name] EDBC Summary page

2.1.1 Overview

A Change Reason button will be added to the [Program Name] EDBC Summary page. When clicked, the user will be navigated to a new page (refer to Recommendation 2.2 for details about the new page).

2.1.2 [Program Name] EDBC Summary Mockup CalFresh EDBC Summary

*- Indicates required fields

[Change Reason](#) [Accept](#) [Cancel](#)

Begin Month	End Month	Run Date	Run Status	Accepted By
06/2019		05/08/2019	Not Accepted	Change Reason

EDBC Information

Semi-Annual Reporting Period Begin
Month: 01/2019

Reporting Type Reason:
Type: Regular
Recalculation: No

Regular Program Configuration

System Determination
EDBC Source: Online EDBC Rules
Aid Code: 09 - CalFresh
Program Status: Active
SUAS Eligible: No
Program Type: Regular

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason
Reason, Change	01/01/1965	MEM		Active	

[Override Program Configuration](#)

Figure 2.1.1 – Change Reason button on [Program Name] EDBC Summary page

2.1.3 Description of Changes

Add a “Change Reason” button on the [Program Name] EDBC Summary page.

Note: If no apply dates were determined and there is no data to display, the button will display.

2.1.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.1.8 Programs Impacted

Change Reason programs (CW, RCA, CF, GR, CAPI, NB)

2.2 [Program Name] Change Reason List – New Apply Dates

2.2.1 Overview

A new page, [Program Name] Change Reason List – New Apply Dates, will display a list of Change Reasons.

2.2.2 [Program Name] Change Reason List – New Apply Dates Mockup

CalFresh Change Reason List - New Apply Dates

Type	Change Reason	Report Date	Begin Date	End Date	Apply Date	Apply Reason
Liquid Property History Detail	Reported on PR/RE	01/01/2019	01/01/2019		01/01/2019	All Changes
Income Amount Detail	Reported on PR/RE	01/01/2019	01/01/2019		01/01/2019	All Changes

Figure 2.2.1 – [Program Name] Change Reason List – New Apply Dates page

2.2.3 Description of Changes

1. Create a new page – “[Program Name] Change Reason List – New Apply Dates”. This page is accessed from the Change Reason button on the [Program Name] EDBC Summary page. The new page will contain the following columns:
 - a. Type – the data collection page related to the change reason.
 - b. Change Reason – the reason for the change.
 - c. Report Date – the date the change was reported.
 - d. Begin Date – the begin date of the data collection record.
 - e. End Date – the end date of the data collection record.
 - f. Apply Date – the date a data change can be applied by EDBC. If the change cannot be applied until the next period, a blank apply date will be displayed.
 - g. Apply Reason - the reason the change reason was or was not applied by EDBC.

Note: The Apply Reasons will be defined in the Recommendation 2.3.

Note:

1. The sorting of the columns will use the existing logic as the Change Reason List page.
2. The columns, Type and Change reason, will be populated using the existing Change Reason logic.
3. The [Program Name] for the new page will populate based on the EDBC program and will follow existing naming standards of the [Program Name] EDBC Summary page.
4. The Apply Date will be evaluated for data that overlaps the benefit month(s) being processed by EDBC. For example, data entered with a begin date of 02/01/2019 will not be evaluated for an EDBC run for the benefit month of 01/01/2019.
5. The Apply Date will be displayed if either criterion is met:
 - i. Apply Date is being set for the first time, OR
 - ii. Apply Date is being reset to a different value.
6. The Apply date may be blank when the Apply Date does not start in the current period.

Example: For a CalWORKs program with a SAR period of January through June, an income increase is entered beginning March 1 (not over IRT). The income increase cannot be used until the next period. The March EDBC will not display an Apply Date, and the July EDBC will display an Apply Date.

Technical note:

1. The status will be 'Evaluated – Not Saved' for all change reasons on this page. The status means that the Apply Date has been determined, but

the status will not be permanent until the user has Accepted and Saved the EDBC.

2. Apply Dates will apply for a single program.
3. Only display the EDBC Change Logic (ECL) and EDBC Change Apply Date (ECAD) combination when the ECAD status is 'Evaluated – Not Saved'.
4. The stored procedure, p_run_edbc_suggst_edbc, that runs when the page is navigated to the Run EDBC page will need to be updated. The latest Apply Date Reason will need to be copied to the latest ECAD.

2.2.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC > Run EDBC > (Program) EDBC hyperlink > Change Reason

2.2.5 Security Updates

Security Groups tied to the Change Reason List page accessed through the security rights of the Change Reason button.

2.2.6 Page Mapping

Create a new PMCR for the new page for all the fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Change Reason Apply Reasons

2.3.1 Overview

The new page, [Program Name] Change Reason List – New Apply Dates, will have a column, Apply Reason, that will be populated based on the reason the change reason is/is not applied.

2.3.2 Description of Changes

1. Add Change Reason Apply Reasons that will be used to populate the Apply Reason column.

2. Add a tool tip (hover) window to the Apply Reason field on the Change Reason List – New Apply Dates page.
 - a. The tool tip window will display the description of the apply reason.

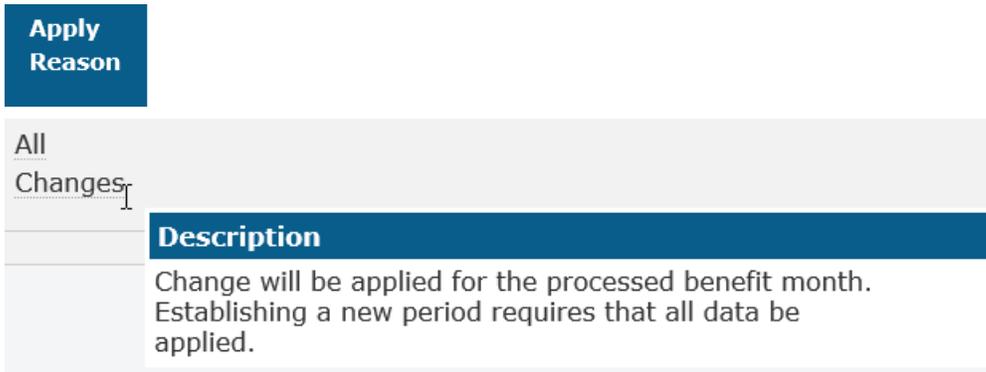


Figure 2.3.1 – Apply Reason Description

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The below table is based on existing Change Reason functionality.

Apply Reason	Description
All Changes	Change will be applied for the processed benefit month. Establishing a new period requires that all data be applied.
New Applicant	Change will be applied for the processed benefit month. All of a person's data is considered when evaluating a new applicant.
State Hearing	Change will be applied for the processed benefit month. The State Hearing mandates data be applied as of the begin date.
Anticipated Income	Income will be applied for the processed benefit month. Anticipated income is applied as of the begin date.
Period Required - Beneficial	Period Required - Beneficial Change applied in month of report if verified timely. If not verified timely, change applied in month of verification. (Beneficial Type 1)
Period Required - Negative	Period Required - Negative Change applied from the start of the period.
Period Required - Beneficial	Period Required - Beneficial Change applied the first of the month following the report date if verified timely. If not verified timely, change applied the first of the month following the verification date. (Beneficial Type 3)
Period Required - Negative	Period Required - Negative Change applied from the start of the period.
Mid Period - Beneficial	Voluntary Mid Period Beneficial Change - Timely Verification Change applied in month of report. (Beneficial Type 1)
Mid Period - Beneficial	Voluntary Mid Period Beneficial Change - Untimely Verification Change applied in month of verification. (Beneficial Type 1)
Mid Period - Beneficial	Mandatory Mid Period Beneficial Change Change applied in month of verification. (Beneficial Type 2)
Mid Period - Negative	Voluntary Mid Period Negative Change Change cannot be applied until the next period. (Negative Type 1)
Mid Period - Negative	Voluntary Mid Period Negative Change Change applied with 10-day timely notice based on the date EDBC is processed. Overissuance never allowed. (Negative Type 2)

Apply Reason	Description
Mid Period - Negative	Mandatory Mid Period Negative Change Change applied the first of the month following the month in which the change occurs even if not verified. Overpayment/overissuance possible even without a late report. (Negative Type 3)
Mid Period - Negative	Mandatory Mid Period Negative Change Change applied with 10-day timely notice based on timely report. Overpayment/overissuance possible with late report based on whether 10-day notice would have been possible with timely report. (Negative Type 4)
Mid Period - Negative	Mandatory Mid Period Negative Change - Timely Report Change applied with 10-day timely notice from report date. (Negative Type 5)
Mid Period - Negative	Mandatory Mid Period Negative Change - Untimely Report Change applied first of the month following the month in which the change occurs even if not verified. (Negative Type 5)
SSA COLA	For already applied SSA income, change applied based on State mandate. This can change year-to-year.
Not Determined	An Apply Reason was not determined.

Note: Existing Apply Dates that were determined prior to the implementation of this DDID will not have an Apply Reason defined. The Apply Reason will be null when the Apply Reason is not defined.

2.3.3 Programs Impacted

Change Reason programs (CW, RCA, CF, GR, CAPI, NB)

2.3.4 Performance Impacts

N/A

2.4 Update Existing Change Reason Detail

2.4.1 Overview

The existing page, Change Reason Detail, does not have the Apply Reason column. This column will be added and populated based on the reason the change reason is/is not applied.

2.4.2 Change Reason Detail Mockup Change Reason Detail

*- Indicates required fields

The mockup shows a form with the following fields:

- Type:** Income Amount Detail
- Begin Date:** 01/01/2018
- End Date:**
- Change Reason:** * Participant Provided - Verbal
- Report Date:** * 01/01/2018

Below the form is a table titled "Program Evaluation":

Case	Program	Status	Apply Date	Apply Reason
L08B389	CalFresh	Applied	01/01/2018	All Changes

The "Apply Reason" column in the table is highlighted with a red box. The form and table are surrounded by "View History" and "Close" buttons.

Figure 2.4.1 – Change Reason Detail page

2.4.3 Description of Changes

1. Add Change Reason Apply Reasons that will be used to populate the Apply Reason column.

Note: See section 2.3 for details on apply reasons.

2.4.4 Page Location

Global: Eligibility

Local: Customer Information

Task: Run EDBC > Run EDBC > Change Reason

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Create a new PMCR for the Apply Reason column.

2.4.7 Page Usage/Data Volume Impacts

N/A

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3 REQUIREMENTS

3.1 Migration Requirements

DDID #	Requirement Text	Contractor Assumptions	How Requirement Met
1098	<p>The CONTRACTOR shall update and/or create new EDBC child pages to display the Change Reasons that were applied and/or not applied by EDBC and the reason the change was/was not applied.</p>	<ul style="list-style-type: none"> It is assumed that the data needed to be tracked using Change Reasons and Apply Dates in EDBC will not be changed for CalSAWS. CalSAWS will use the Change Reason policy that LRS has implemented. Any additional work effort beyond storing the reason the change was or was not applied and creating child pages to display the information will be estimated by the CONTRACTOR and submitted to the CONSORTIUM for approval and to determine the appropriate method of funding the work. In addition, this will require an adjustment to the EDBC performance requirements. 	<p>A Change Reason button is displayed on the [Program Name] EDBC Summary page for Change Reason programs. A new page is created to display information about the Change Reasons for specific programs.</p>